AMMIS TPL User Manual – Part 1

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Alabama Medicaid Agency
501 Dexter Avenue
Montgomery, Alabama 36104

DXC Technology
301 Technacenter Drive
Montgomery, Alabama 36117

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1. Document Control

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1.1 Document Information Page

Required Information	Definition
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1.2 Amendment History

The following Amendment History log contains a record of changes made to this document:

Date	Document Version	Author	Reason for the Change	Changes (Section, Page(s) and Text Revised)
11/09/2011	1.1		Application of EIP 5010 changes.	CO 8790 Expanded prescription number field from 7 to 12 digits. Case Tracking Claims Search Panel (6.35.2 and 6.35.3) CO 8484 Added a new drop down box titled HIPAA Version allowing the user to manually select and save which HIPAA format the insurance carrier will accept, 4010 or 5010. Other - Carrier Panel (6.103.2, 6.103.3) Added new step action tables (6.103.7, 6.103.8 and 6.103.9)
12/12/2011	2.0		Agency approved	
05/03/2012	2.1		Application of CO_7490_	Updated sections 6.8.2, 6.8.3 for the TPL Base Information Panel.
07/10/2012	3.0		Application of CO 9805	Updated section 6.70 Search - Policy Number Panel Update section 6.96 Related Data Other Panel to reflect the addition of the Nasco Policy Prefixes panel

Date	Document Version	Author	Reason for the Change	Changes (Section, Page(s) and Text Revised)
				Add section 6. 109 Nasco Policy Prefixes Panel.
10/08/2013	4.0		Application of ICD-10 project change orders	CO 10095: Update section 6.35 Case Tracking Claims Search panel. Updates include changes to the panel layout, field descripitons and field edit error messages. Update section 6.36 Case Tracking Search Results Panel. Update include changes to the panel layout and field descriptions. CO 10101: Update section 6.41 Case Tracking Offline Claims Panel. Updates include changes to the panel layout, field descriptions and field edit error messages.
10/27/2016	5.0		Application of CO 13778 and 12819	CO 13778 - Section 4.4 Changing Passwords – updated section with new process CO 12819: - Update 4.3.1 Logging onto the AMMIS Update 4.3.2 Logging off the AMMIS
12/07/2016	6.0		Application of CO 13461	CO 13461 6.8 TPL Base Information Panel – panel layout, field descriptions, field edit error messages and step action table (add) revised.
10/13/2017	7.0		Application of CO 14433	6.40 Case Tracking Lien Information Panel – update field edit error codes
12/20/2017	8.0		Application of CO 14580 and 14373	6.35 Case Tracking Claims Search Panel 6.92 Codes-Origin Panel – Update panel layout and field descriptions.
01/16/2018	9.0		Application of CO 14640	6.26 Case Tracking Search Panel – update panel layout and field description table
07/13/2018	10.0		Conversion of manual from HPE to DXC	

1.3 Related documentation

Document	Description	url
Global Glossary and Acronyms	This document provides the user with a listing of commonly used terms and acronyms related to the Title XIX program for Alabama.	https://pwb.alxix.slg.eds.com/alxix/help/20100825%20Combined%20Acronyms.htm

2. TPL Introduction

2.1 TPL User Manual Overview

The Alabama Medicaid Management Information System (AMMIS) has several functional areas that perform specific operations for the system users. This user manual is designed to cover the information necessary to perform the tasks associated with the Third Party Liability (TPL) functional area.

This manual covers the following:

- TPL Overview
- TPL System Navigation
- System Wide Common Terminology and Layouts
- Provider Pages/Panels
- Provider Reports

2.2 TPL User Manual Objective

The objective of the AMMIS TPL User Manual is to provide system users with detailed descriptions of the online system, including pages/panels and report field descriptions, pages/panels functionality descriptions and graphical representations of pages/panels and report layouts.

This manual contains references to current AMMIS screens, when applicable. This information will be deleted after implementation training, and is identified in the narrative text in italics.

3. Third Party Liability (TPL) Overview

3.1 Introduction to TPL

The TPL function provides capabilities to manage the private health, Medicare, and other third party resources of Medicaid recipients, and ensures that Medicaid is the payor of last resort. This function works with a combination of cost avoidance (claim denial) and cost recovery (post-payment billing to insurers and recoupments from providers). In addition, the TPL function supports the Health Insurance Premium Payment (HIPP) process that purchases health insurance for selected beneficiaries. To the maximum extent possible, the AMMIS system uses automated processes for cost avoidance. Cost recovery shall be utilized as a backup to the avoidance process.

All input and output transmissions and formats are Health Insurance Portability and Accountability Act (HIPAA) compliant. The information maintained by the AMMIS TPL function includes beneficiary TPL resource data, insurance company data, and post-payment recovery tracking data. TPL coverage type and threshold information are used by the Claims Processing function during claims adjudication.

The primary objectives of the AMMIS TPL function are to:

- Identify third party resources available to Medicaid recipients, which may include participation in HIPP.
- Avoid paying for claims with potential third party coverage.
- Recover funds from third parties when TPL resources are identified retroactively or for mandated "pay-and-chase" payments.
- Track casualty and/or estate related cases.
- Meet federal and State TPL reporting requirements.
- Pay the premiums for health insurance for recipients when it is deemed cost-effective to do so.

The Third Party Liability subsystem consists of five major processes:

- TPL Policy - maintain TPL policy information, through accepting adds, updates or deletes from various external entities.
- HIPP - maintain and process HIPP information and payments.
- Post Pay Billing and Recoupments - recover money on Medicaid paid claims where other entities are liable due to other insurance.
- Case Tracking - recover money on Medicaid paid claims where other entities are liable.
- TPL Reports - used in the maintenance of TPL information.

4. TPL System Navigation

4.1 Overview

The AMMIS is designed according to a set of development standards. This section is designed to introduce users to standard system navigation features within AMMIS.

4.2 System Security

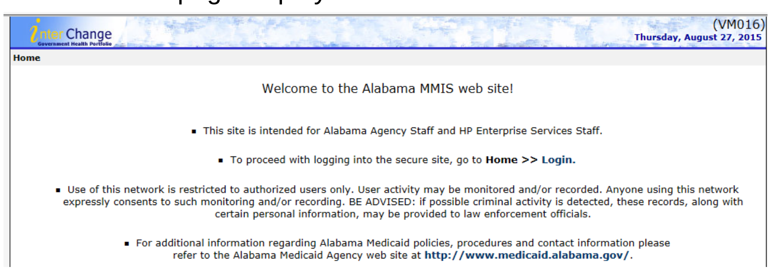
System security is handled by your system administrator. For all other security concerns with operating the system, refer to your department's business rules and practices.

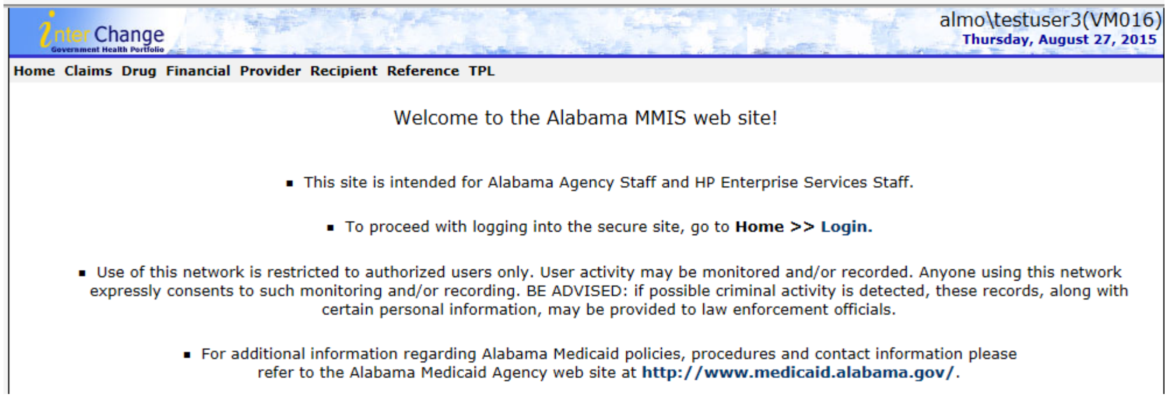
4.3 Logging In/Logging Out

Users must successfully log in to the AMMIS in order to utilize the services available within the secure portal.

4.3.1 Logging into the AMMIS

Follow the steps below to log in to the website:

Step	Action	Response
1	Click **Internet Explorer** or **Netscape Communicator** browser located on your workstation.	Internet Explorer or Netscape Communicator launches.
2	Enter https://pro.alxix.slg.eds.com/alabama/default.aspx and press **Enter** key on your keyboard.	Security Alert message displays.
3	AMMIS Home page displays.  	AMMIS Authentication Home page displays.
4	Click Home -> Login  Note: All field edits are available on iTRACE for login panel.	
5	Enter **User Name** and **Password**. Click **OK**.	

Step	Action	Response
		

4.3.2 Logging off the AMMIS

Click the Exit button on your internet browser or Click Home -> LogOff to log off the AMMIS.

4.4 Changing Passwords

The Change Password panel allows users to change their account password.

Navigation Path: [Home] – [Change Password]

NOTE:

Each field which contains an asterisk represents a required field. Therefore, the corresponding panel is not considered complete until those fields have been completed with the appropriate data.

Follow the steps below to change your password:

Step	Action	Response
1	Enter Current password.	
2	Press **Tab**.	User is taken to the New password field.
3	Enter New password.	

Step	Action	Response
4	Press **Tab**.	User is taken to the Confirm password field.
5	Confirm password by entering it again.	
6	Press **Change Password** button.	Password successfully changed. Note: If a user enters an invalid password the system displays an error message. HPE employees with password problems will need to contact the LAN team. Agency employees with password problems will need to contact theAssistant MMIS Coordinator.

4.5 Screen Display Features

The AMMIS is designed to display within Web browser pages that fit on a personal computer (PC) desktop with a screen resolution of 1024 x 768 pixels. However, in order to fit large system objects such as panels, pages, reports, and letters into one screen print, the user has the option of resetting the text size of the Web browser so that the selected area of the system fits into a screen print.

In addition, there may be some Web browser pages that use a lower pixel configuration and cause a horizontal scroll bar to appear at the bottom of the page for viewing the left side and the right side of the information displayed. In general, pages should only require vertical scrolling.

4.5.1 To Set System Text Size

To set system text size, perform the following steps:

Step	Action	Response
1	Log into the AMMIS.	Home page displays.
2	Select View.	View menu displays.
3	Point to Text Size and click Smaller.	Default text size is set to medium. After the user selects smaller, the system objects appear smaller.

5. System Wide Common Terminology and Layouts

The following section identifies common system terminology and features and, where applicable, an associated screen capture or design layout. This is not an all-inclusive list of common system terms and layouts; however, it is a basic foundation for the beginning user to view and understand prior to navigating the system. These terms are used by technical team members, training specialists, and help desk staff when discussing or, more importantly, documenting aspects of the system.

For information about system wide objects, instead of clicking a subsystem link within the technical design page, the user clicks the System Wide link to open documentation of system objects which are common system wide within the application.

Below is a partial list of common terms described within this document:

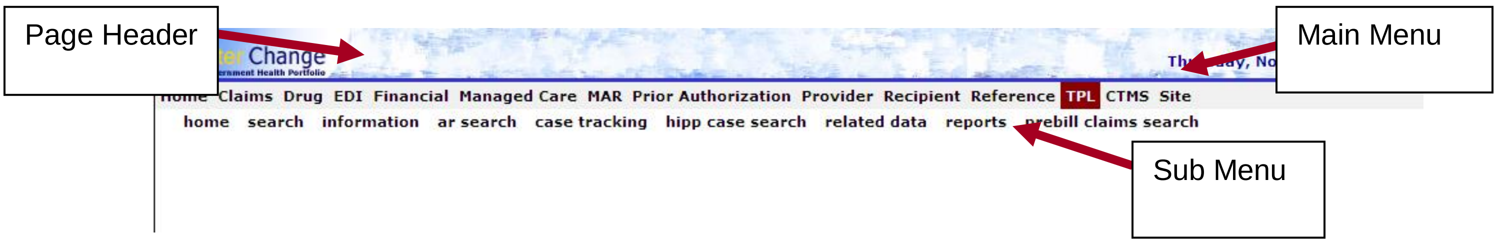
- Page
- Page Header
- Page Footer
- Sub Menu
- Shortcut Keys (ctrl + alt + letter)
- Main Menu bar
- Panel
- Advanced Search
- Mini Search panel
- Hot Link
- Information panel
- Navigation panel
- Task List panel
- Title Bar Icons
- Help Functionality

5.1 Page Layout

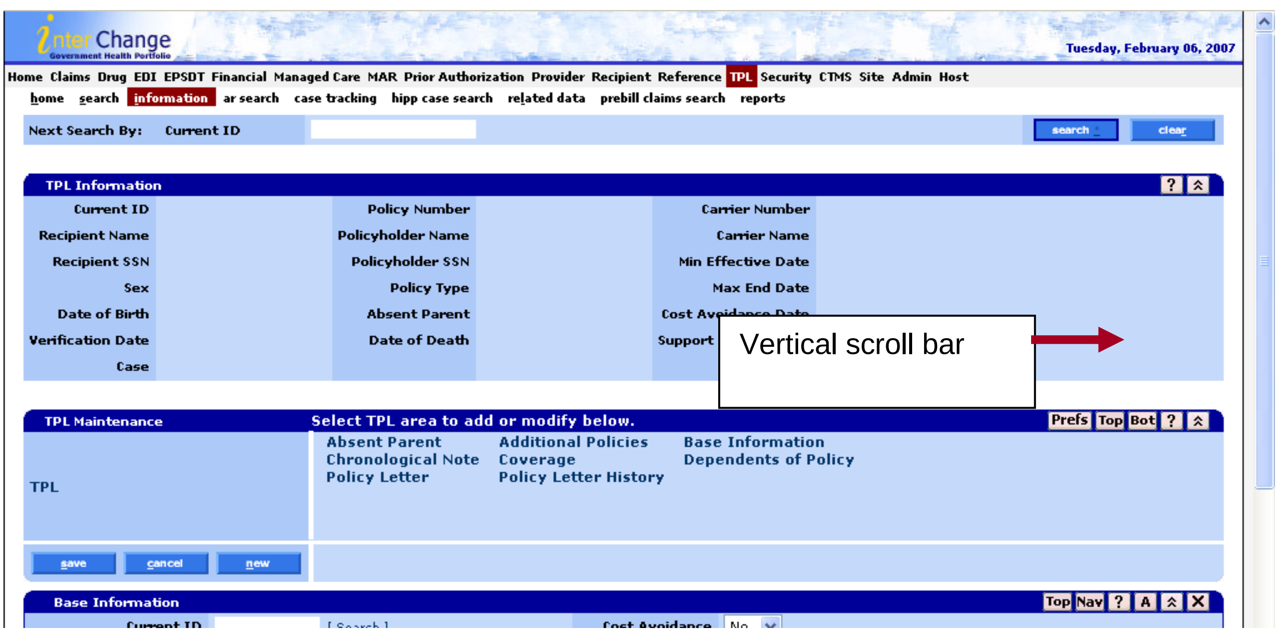
A page is defined as the entire screen that appears in the Web browser. The page contains a page header area with the day and date displayed, a Main Menu bar, a Sub Menu and any associated panels. The bottom of the page contains the Page Footer with the HP Enterprise Services copyright text displayed.

The Main Menu bar contains a horizontal set of links which display pull-down menus. Each pull down menu opens an associated page within the system.

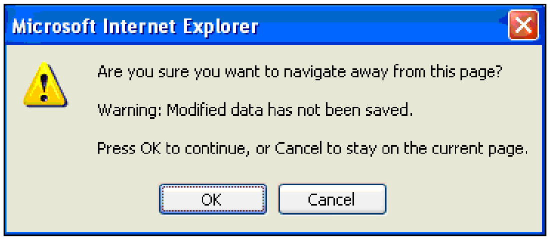
Beneath the Main Menu bar is the Sub Menu of horizontal links that opens an associated page within the system. The Sub Menu links appear in the same order as the Main Menu pull down options, and the Sub Menu links are spelled the same as the Main Menu pull down options.



In general, when navigating a page, the vertical scroll bar should be the only scroll bar needed to view panels stacked in a vertical manner.



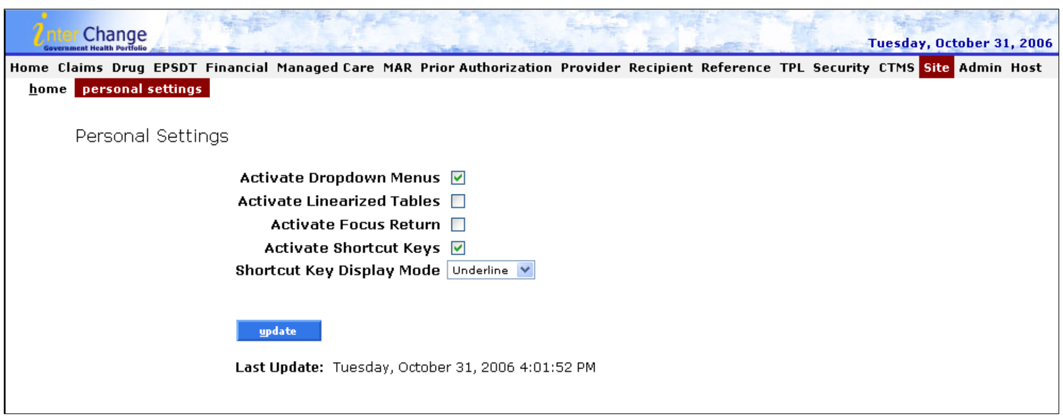
If a user attempts to add, update or delete information within the page prior to navigating away from the page, the system prompts the user with a pop-up window message. When the system generates the message the detail panels are locked open, and navigating away from the page is not permitted until changes are either correctly saved or cancelled.



5.2 Shortcut Keys

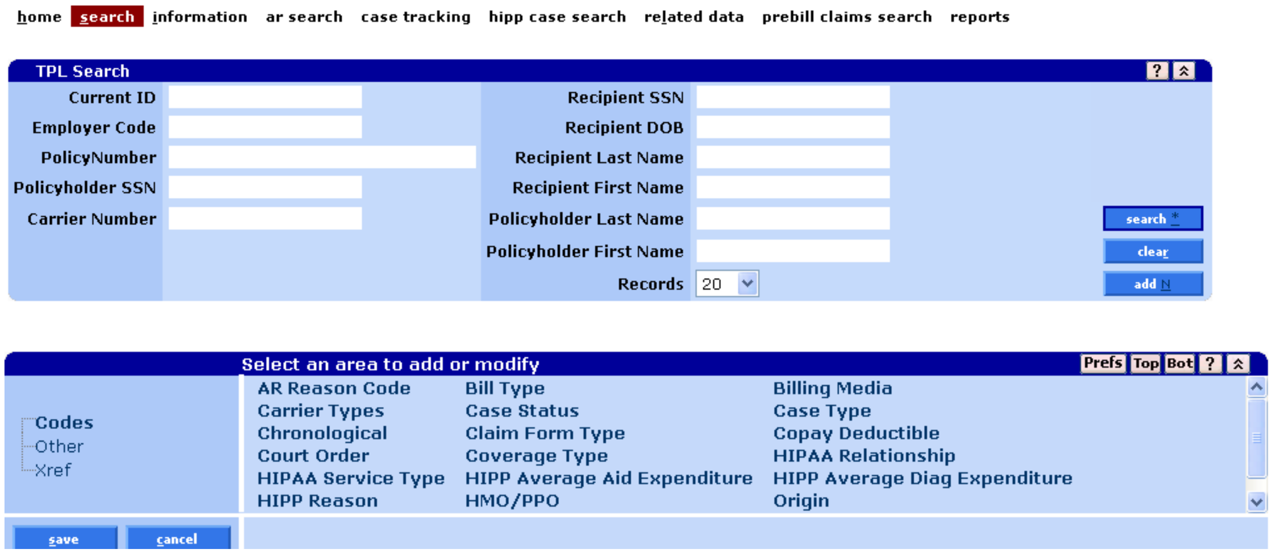
If the user activates the shortcut keys function, the Sub Menu links can be used in combination with the (Ctrl +Alt + shortcut key) to quickly open the associated page.

To activate the shortcut key, click on the Site link, select Personal Settings, check “Activate Shortcut Keys” and click the blue “Update” button.



To know which letter to use in combination with the (Ctrl + Alt) shortcut keys, the user must look at the Sub Menu name. Within the name, the letter that has a horizontal bar below it is the shortcut key letter.

Within the TPL Sub Menu, the user can use the shortcut keys to quickly navigate from the TPL Search panel to the Related Data panel by using the following shortcut key combination: (Ctrl + Alt + L) since the letter “L” is found within the horizontal bars on the Sub Menu related data link.

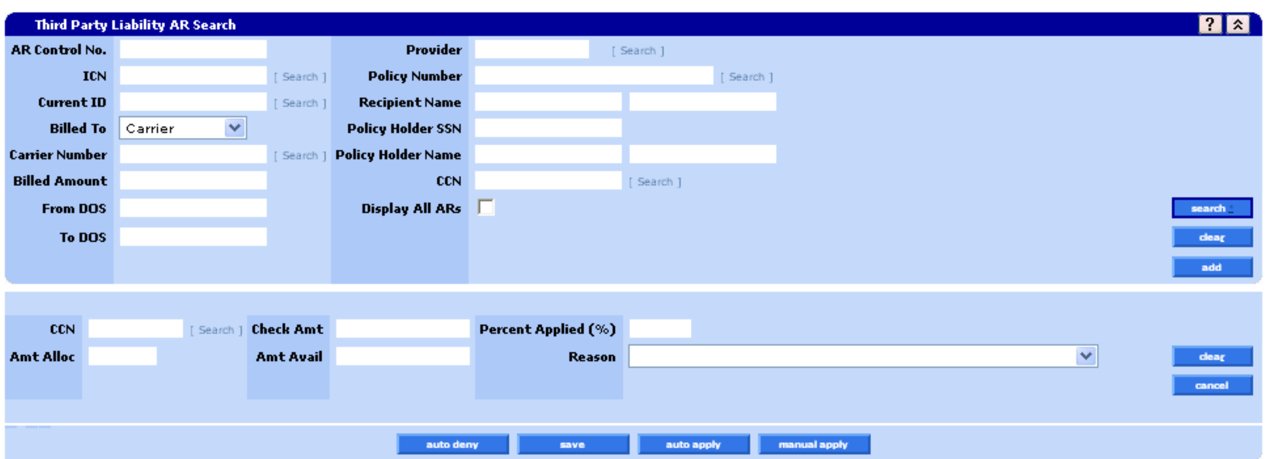


5.3 Search Options

There are several search options available within the AMMIS.

5.3.1 Search Panels

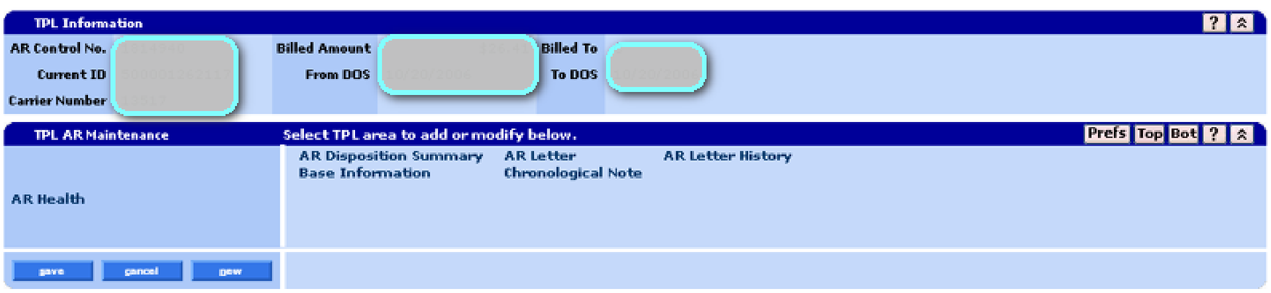
The AMMIS contains more than one type of search panel: Search and Advanced Search. Some subsystems such as the TPL subsystem contain a search panel without an advanced search button included on the panel, such as the image below.



5.3.2 Search Results

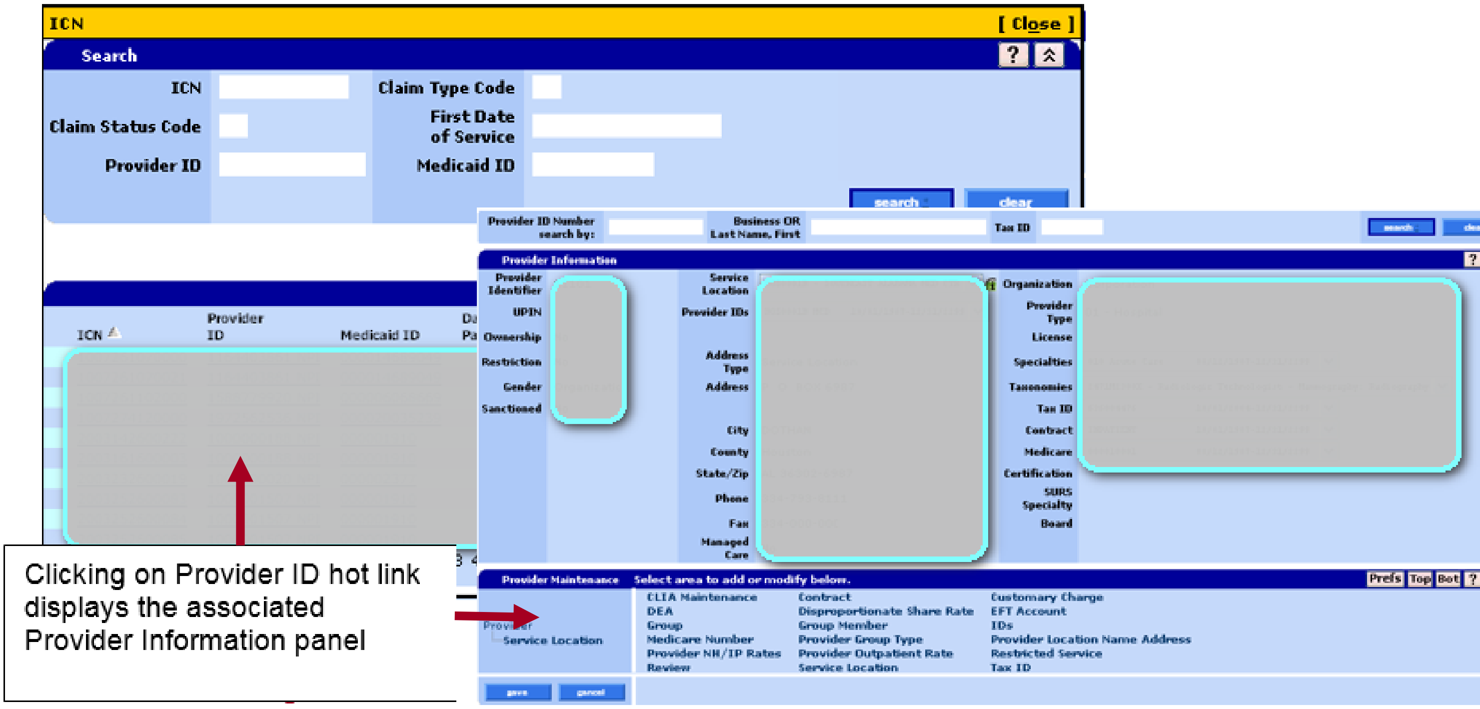
Search results can be sorted in ascending  or descending  order by clicking the column name in the Search Results panel. All search results are resorted, not just the search results displayed on the current search result panel.

If the user clicks once on a search result row, the associated TPL Information panel opens. In the following figure, the user clicked the first row of the TPL AR Search Results panel and detailed information displayed at the bottom of the panel.



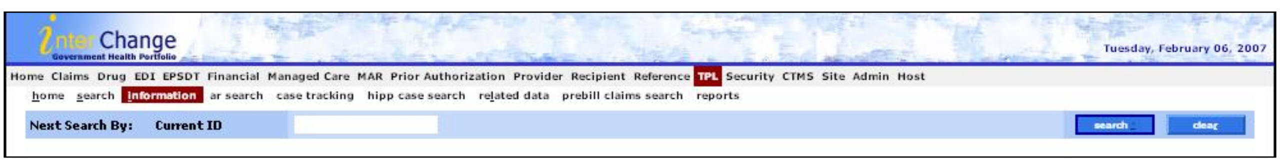
5.3.3 Hot Links

Within certain Search panels, the user can also click hot links to see additional information. If the fields in a column are underlined, there is a hot link available.



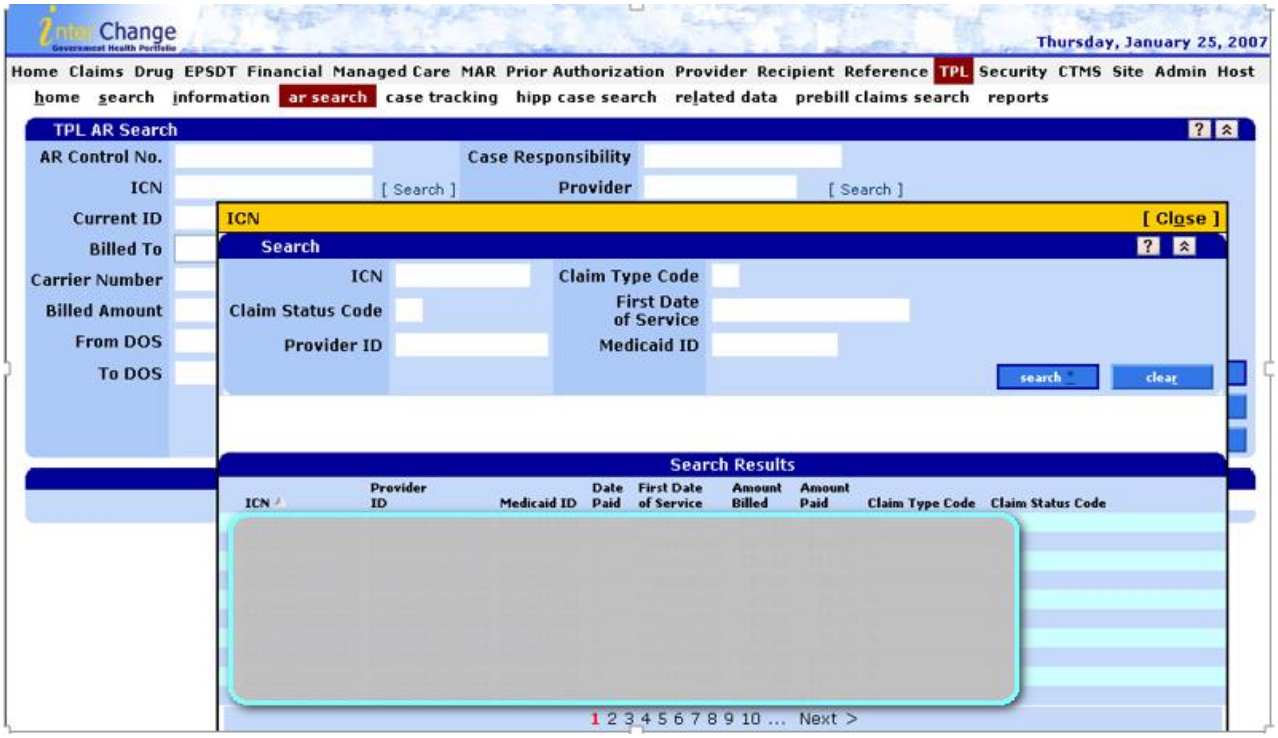
5.3.4 Mini Search

After the user has viewed at least one search result in an information panel, another search can be completed by using the primary search fields within the Mini Search panel located above the information panel containing the search result. Mini Search panels contain one or two primary search fields related to the business process.



5.3.5 Pop Up Search

A Pop Up Search allows the user to search for field data without leaving the page. By clicking on the (Search) link, the user accesses the search panel that is associated with that particular field.



5.4 Panel Layout

A panel is defined as a portion of a page that performs a well-defined unit of functionality. Some panels always appear on a page, while others only appear when invoked by the user.

5.4.1 Panel Type and Functions

The system contains various panel types with specific functions for each panel type. Some panels have common icons while other panels have icons specific to their functions. Listed below are icons that can be found on one or more types of panels:

Name	Icon	Description
Add Button	add	Inserts a new data record.
Delete Button	delete	Deletes a selected data record.
Cancel Button	cancel	Cancels all changes applied to all panels on the page. Can be found on the navigation panel.
Save Button	save	Saves all changes to all panels on the page. If validation errors occur, an error message displays in the Task List panel. Can be found on the navigation panel.

Name	Icon	Description
Maintain Button	maintain	Allows the user to manually request a letter.
Preferences Button	Prefs	Allows user to place a checkmark next to each navigation panel they would like to see whenever they browse the TPL subsystem. To hide the boxes, click the checkbox a second time. Can be found only on the Navigation panel.
Top Button	Top	Allows user to jump to the top of the page.
Bottom Button	Bot	Allows user to jump to the bottom of the page.
Help Button	?	Opens a window that displays the panel help page.
Maximize Button		Expands a panel to display all of its content.
Minimize Button		Collapses a panel.
Navigation Button	Nav	Allows a user to jump to the Navigation panel.
Audit History Button	A	Opens the Audit History Panel for a specific panel.
Close Button	X	Closes a panel.
Green Information Button		Opens information file for the associated field.

Among the panel types are the following:

Maintenance panel

Task List panel

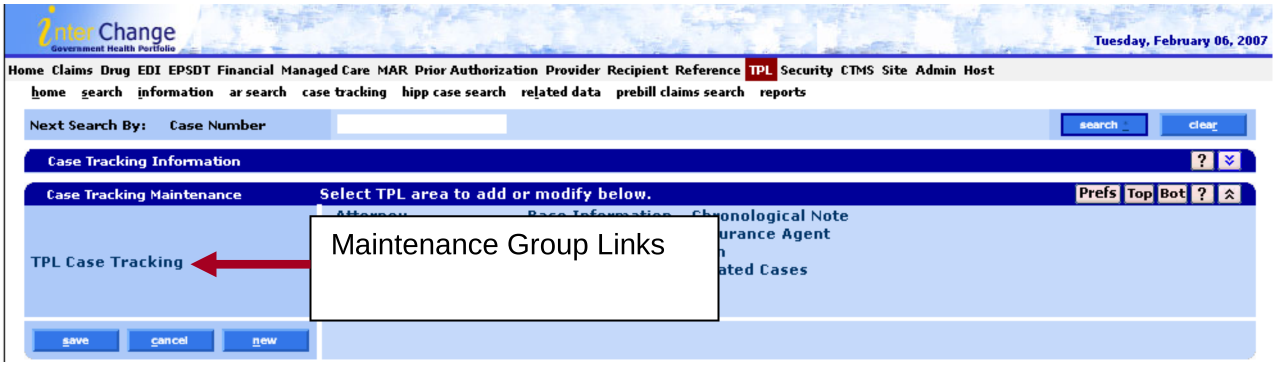
Maintenance Item Panel

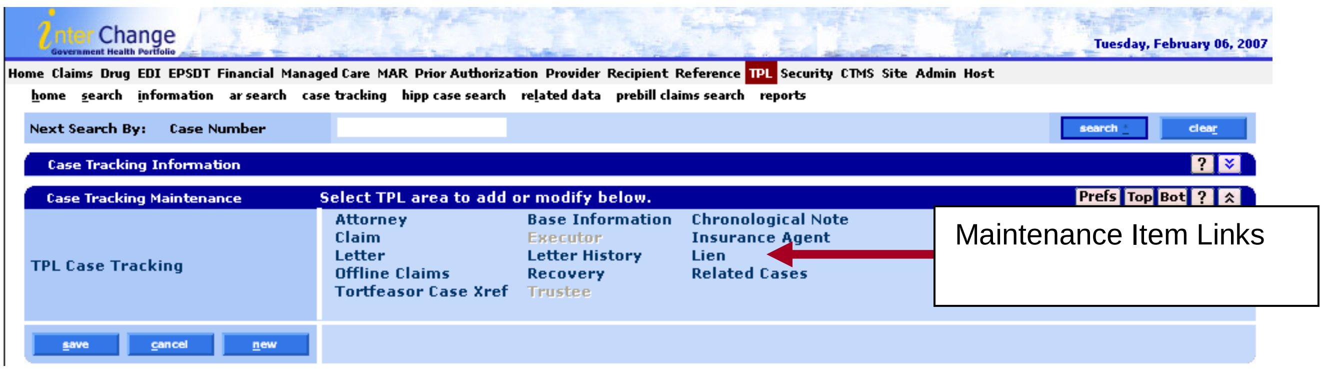
Audit panel

5.4.2 Maintenance Panel

A maintenance panel is a special control panel that uses links to open or close panels on a Web page. By clicking on a Maintenance Group Link, the associated Maintenance Item panel is displayed. Changes to Maintenance Items displayed on the page are saved or cancelled by clicking the Save or Cancel buttons on the Maintenance panel.

The Maintenance panel is used to navigate within a page, never to leave the page. The following image demonstrates Maintenance Group Links (TPL Case Tracking) and the associated Maintenance Item links.

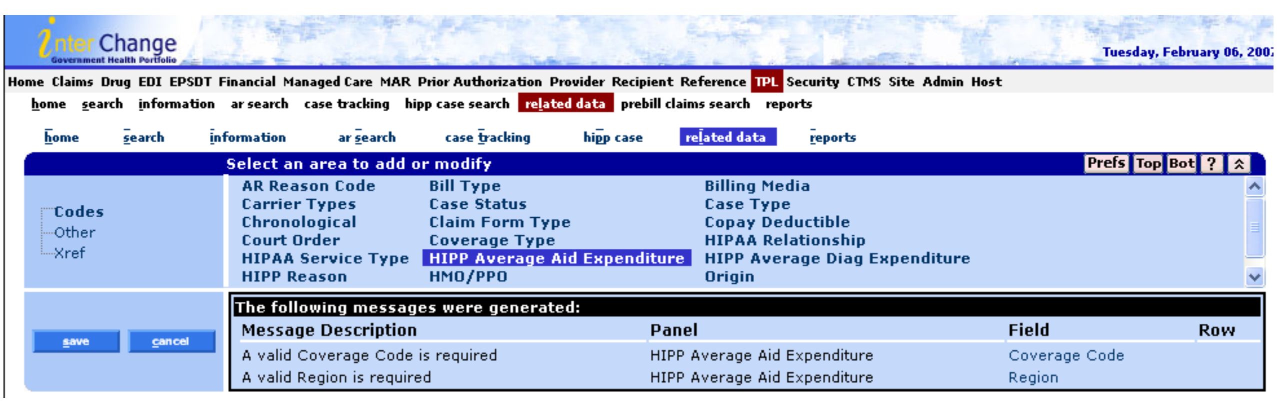




By clicking on a Maintenance Item Link (such as Lien), the associated panel opens.

5.4.3 Task List Panel

Task List panels appear within navigation panels and provide messages to the user regarding whether the data was successfully saved, if errors occurred to prevent the data from being successfully saved, or warning messages which may or may not include a radio button selection for the user to activate prior to completing the task.



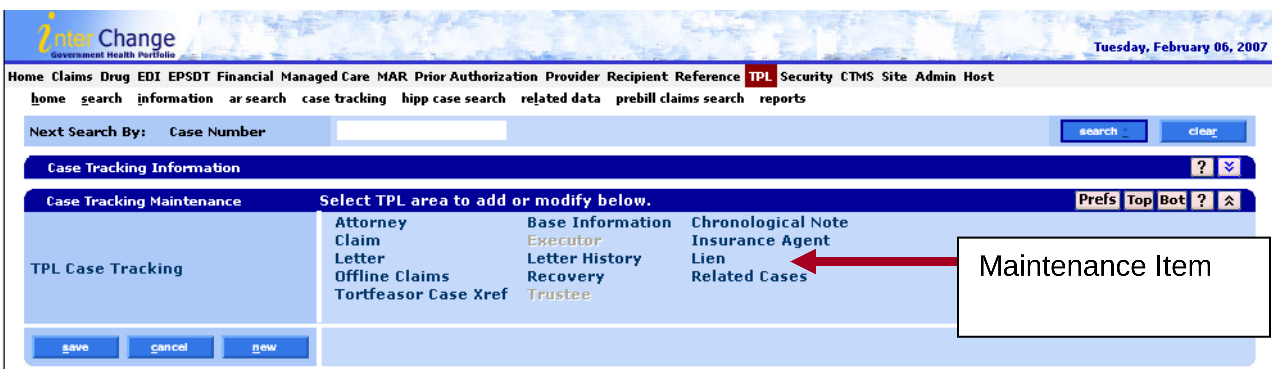
The task list contains both the name of the panel where the error occurred, and the field name or row in order to help users quickly identify key areas to correct prior to attempting another save action.

Warning messages provide users with a warning about the data they are trying to update, delete, add or save. For example, if the user attempts to add a duplicate record, the system generates a warning message.

An error message can also contain additional information which is accessed by clicking on a square node icon in the lower left side of the Task List panel.

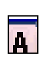
5.4.4 Maintenance Item Panel

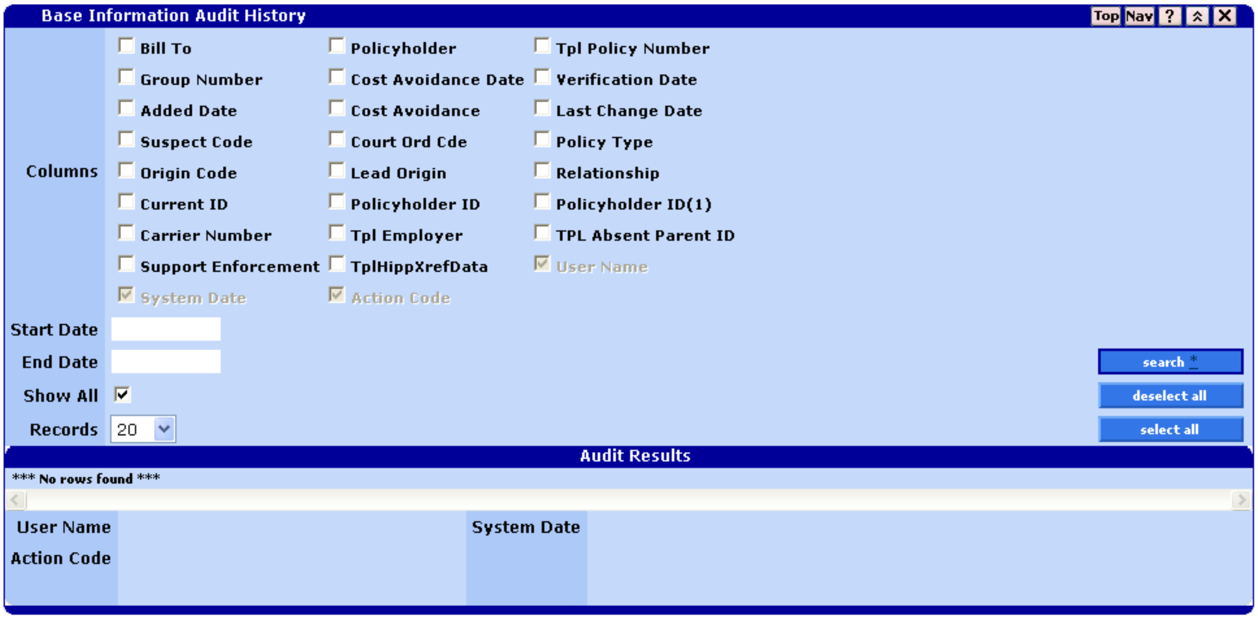
A Maintenance Item panel is opened by clicking a link on the Maintenance panel. Maintenance Items allow detail data to be viewed and updated. Usually a Maintenance Item has a list of data records and a panel to perform data updates. Click the Add button to enter a new data record. Or click a data record from the list to perform field updates or to delete the record. Once selected, a data record is deleted by clicking the Delete button. All adds, deletes and updates must be followed by a Save before the transaction is permanent.



5.4.5 Audit Panel

Audit panels display data change history for a given Navigator Item panel. Every insert, update or delete that is performed (on an updatable panel) in the system causes a "before" image of the data to be saved to the audit table. Users can then use the audit panel to display this information.

Audit panels are opened by clicking the  button in the Navigator Item panel.



5.5 Help Functionality

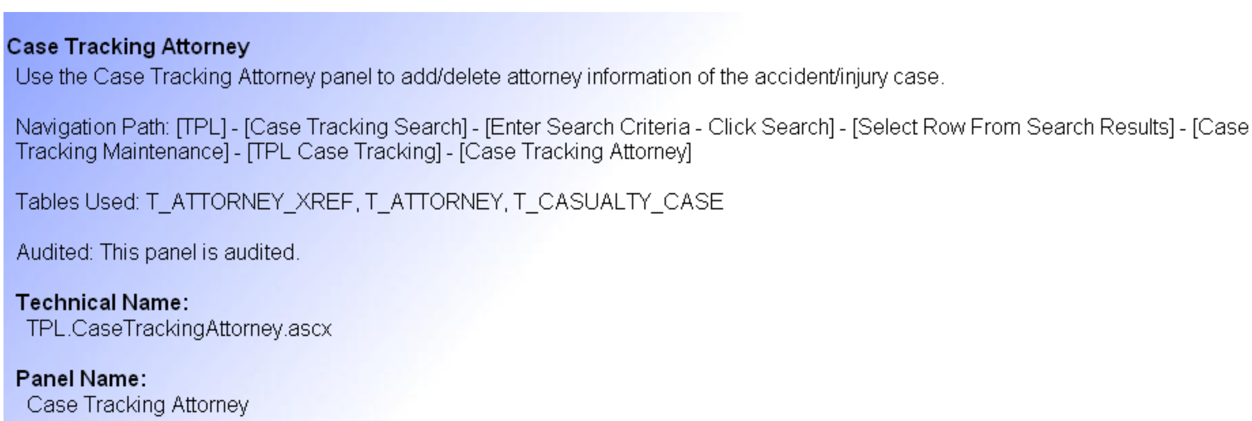
The AMMIS contains two paths to locate help: Question Mark Icon and Field Level Help.

5.5.1 Question Mark Icon ?

The Question Mark icon is used to access page/panel level help. Click the Question Mark icon to launch a separate Internet browser that contains information on the page/panel.

5.5.1.1 Panel Help Feature - Question Mark Function Description

Upon accessing the **Panel Help** function a description of the panel is displayed within the window:



Case Tracking Attorney

Use the Case Tracking Attorney panel to add/delete attorney information of the accident/injury case.

Navigation Path: [TPL] - [Case Tracking Search] - [Enter Search Criteria - Click Search] - [Select Row From Search Results] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Case Tracking Attorney]

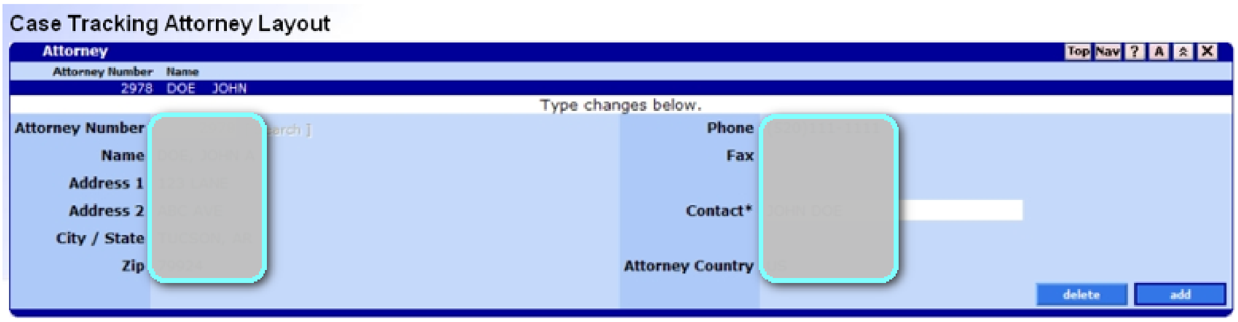
Tables Used: T_ATTORNEY_XREF, T_ATTORNEY, T_CASUALTY_CASE

Audited: This panel is audited.

Technical Name:
TPL.CaseTrackingAttorney.ascx

Panel Name:
Case Tracking Attorney

The second item displayed is the **Panel Layout**:



The third item displayed is the **Field Description** information related to the panel:

Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Add new record.	Button	N/A	0
Delete	Delete the record.	Button	N/A	0
Address 1	Address of the attorney.	Field	Character	30
Address 2	Address 2 of the attorney.	Field	Character	30
Attorney Country	Country of the attorney.	Field	Character	2
Attorney Number (List)	Unique system assigned number for each attorney.	Field	Character	8
Attorney Number (Panel)	Unique system assigned number for each attorney.	Field	Character	8
City / State	City and state of the attorney.	Field	Character	20
Contact	Attorney contact person name.	Field	Character	40
Fax	Fax machine number of the attorney.	Field	Character	10
Name (List)	Member's attorney's last name, first name and middle initial.	Field	Character	29
Name (Panel)	Member attorney's last name, first name and middle initial.	Field	Character	29
Phone	Phone number of the attorney.	Field	Character	10
Zip	The first 5 digits and the last 4 digits of the zip code for the attorney.	Field	Character	9

The fourth item displayed is the **Field Edit** information related to the panel. This portion of documentation provides the field name, the error messages associated to the field(s) and a brief explanation of how to correct the data in the field in order to bypass the error message displayed in the user interface.

Field Edits

Field	Field Type	Error Code	Error Message	To Correct
Attorney Number (List)	Field	1	A valid Attorney Number is required.	Enter or select a valid Attorney Number.
	Field	2	This Attorney is already in the list.	Enter or select a different Attorney Number.
Contact	Field	1	Contact is required.	Enter a contact name.

The information available via the Question Mark icon is virtually the same panel information accessible in iTRACE. For example, the bottom of the page contains data such as, Requirements, Test Cases, Change Orders/Defects and any Associated documentation that relates to a panel.

To close out of the Help panel, click the ☒ in the browser title bar.

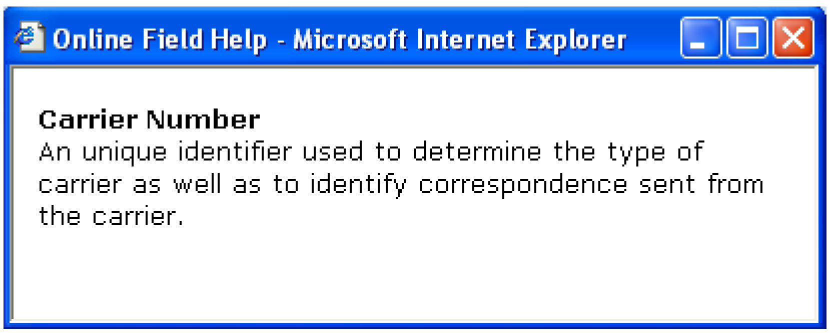
5.5.2 Field Level Help

Field Level Help is used to access field definitions related to a specific field selected. Click the Field Name to launch a pop-up window that contains information on the field selected.

5.5.2.1 Field Level Help Description

When hovering the cursor over a field name, such as **Carrier Number**, a question mark appears as part of the cursor .

Click once on the text area of the field and a popup window appears with a description of the field, such as the one provided below:



To close out of the Field Level Help window, click the  in the Online Field Help title bar.

6. TPL Pages/Panels

This section gives a brief description of each page/panel, shows a sample, and describes all associated page/panel fields and field edits.

The page/panels Field Description table is sorted in alphabetical order.

Each page/panel covers the following:

Page/Panel Narrative

Page/Panel Layout

Page/Panel Field Descriptions

Page/Panel Field Edit Error Code Tables

Page/Panel Extra Features

Page/Panel Accessibility

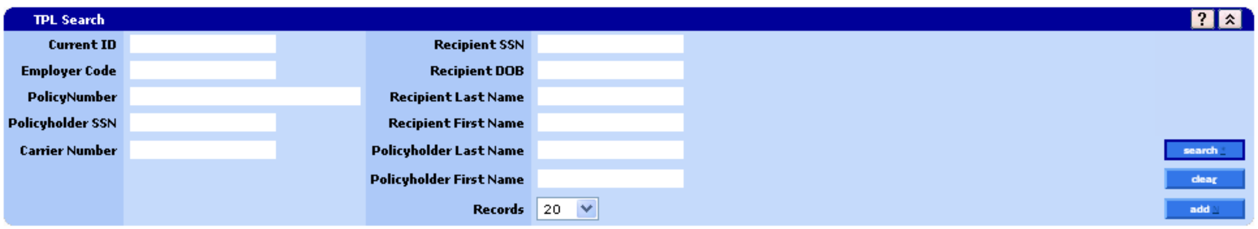
6.1 TPL Search Panel Overview

6.1.1 TPL Search Panel Narrative

The TPL Policy Search panel is used to access a client's TPL records. The user can inquire about clients with TPL. On the TPL Search panel, different combinations can be used to inquire on the client's TPL record. Once the search criterion has been entered and the search is activated by clicking on the Search button, the data is displayed in the search results section of the panel. This panel is inquiry only.

Navigation Path: [TPL] – [Search]

6.1.2 TPL Search Panel Layout



6.1.3 TPL Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the TPL Search panel.	Button	N/A	0
Carrier Number	A unique user-defined carrier identification number used on all panels and reports.	Field	Character	7
Clear	Clears the fields in the search fields.	Button	N/A	0
Current ID	Recipient's Medicaid identification number.	Field	Character	12
Employer Code	Employer's identification number.	Field	Character	7
Policyholder First Name	The first name of the holder.	Field	Character	13
Policyholder Last Name	The last name of the holder.	Field	Character	15
Policyholder SSN	The Social Security Number of the recipient.	Field	Number (Integer)	9
Policy Number	Policy number for this insurance policy.	Field	Character	30
Recipient DOB	The date of birth of a recipient.	Field	Date (MM/DD/CCYY)	8
Recipient First Name	The first name of a recipient.	Field	Character	13

Field	Description	Field Type	Data Type	Length
Recipient Last Name	The last name of a recipient.	Field	Character	15
Recipient SSN	The Social Security Number for a recipient.	Field	Number (Integer)	9
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Initiates a search based on the criteria entered.	Button	N/A	0

6.1.4 TPL Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Current ID	Field	91088	Current ID Not On File.	Verify entry - If correct then recipient is not in system.
Policyholder Last Name	Field	7092	Last name is required when first name is keyed.	Enter last name.
Recipient Last Name	Field	7092	Last name is required when first name is keyed.	Enter the policyholder's last name.
Search	Button	1	Please enter at least one of the following fields Current ID, Employer Code, Policy Number, Policyholder SSN, Carrier Number, Recipient SSN, Recipient Last Name, Policyholder Last Name.	Enter a value in one of the search fields.

6.1.5 TPL Search Panel Extra Features

At least one of the following fields must be entered to search: Current ID, Policy Number, Policyholder SSN, Carrier Number, Recipient SSN, Recipient Last Name, Policyholder Last Name.

If one of the following optional fields is entered, it is required to have at least one of the following fields entered with it: Recipient DOB, Recipient First Name, Policyholder First name. That is, if the recipient's first name is entered, it is required to have the last name also.

Linking Recipient IDs

If the user enters a Current ID, the panel determines if the ID entered is active. If not, the panel will retrieve and display the records based on the active ID.

6.1.6 TPL Search Panel Accessibility

6.1.6.1 To Access the TPL Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.

6.2 TPL Search Results Panel Overview

6.2.1 TPL Search Results Panel Narrative

The Alabama Medicaid Agency (Agency) and HP Enterprise Services (HPES) use the TPL Search Results panel to access a recipient's TPL records. This panel is display only.

Navigation Path: [TPL] – [Search] - [(Enter search criteria and click on Search)]

6.2.2 TPL Search Results Panel Layout

6.2.3 TPL Search Results Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Carrier Name	The business name of an insurance carrier.	Listview	Character	45
Carrier Number	A unique identifier used to determine the type of carrier as well as to identify correspondence sent from the carrier.	Listview	Number (Integer)	7
Current ID	Unique identifier for the recipient.	Listview	Number (Integer)	12
Employer Code	Employer's identification number.	Field	Character	7
Group Policy Number	Policy group number. If present, gives the group number of the policy.	Listview	Character	30
Max End Date	The effective ending date of this coverage code.	Listview	Date (MM/DD/CCYY)	8
Min Effective Date	The effective begin date of this coverage code.	Listview	Date (MM/DD/CCYY)	8
Policy Number	Policy number for this insurance policy.	Listview	Character	30
Policy Type	This code identifies the type of insurance policy that the recipient is covered under.	Listview	Number (Integer)	1
Policyholder Name	The name of the policyholder.	Listview	Character	31

Field	Description	Field Type	Data Type	Length
Policyholder SSN	The Social Security Number of the policyholder.	Field	Number (Integer)	9
Recip HIPP	Indicates whether the Recipient is enrolled in the Health Insurance Premium Payment Program (HIPP). Valid values are "Yes" and "No".	Listview	Character	3
Recipient DOB	The date of birth for a recipient.	Listview	Date (MM/DD/CCYY)	8
Recipient Name	The name of a recipient.	Listview	Character	31
Recipient SSN	The Social Security Number for a recipient.	Listview	Number (Integer)	9

6.2.4 TPL Search Results Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.2.5 TPL Search Results Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.2.6 TPL Search Results Panel Accessibility

6.2.6.1 To Access the TPL Search Results Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter **Search** criteria. Note: User must enter at least one search field to initiate search function.	
4	Click **Search**.	Results of search displays. Note: If searching by Recipient last name, Recipient first name, Policyholder Last Name or Policyholder First Name there may be multiple results.
5	Select row to view details.	TPL Information and Maintenance panels display.

6.3 TPL Mini Search Panel Overview

6.3.1 TPL Mini Search Panel Narrative

The TPL Mini Search panel allows the user to search by Recipient ID. This panel is inquiry only.

Navigation Path: [TPL] – [Search] - [(Select row from search results)] - [Search] OR [TPL - Information] - [Search]

6.3.2 TPL Mini Search Panel Layout

6.3.3 TPL Mini Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Clear	Clears the value in Current identification number.	Button	N/A	0
Search	Initiates the Search by Current identification number.	Button	N/A	0
Current ID	The Recipient Medicaid identification number.	Field	Character	12

6.3.4 TPL Mini Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Search	Button	1	Current ID Not on File.	Enter a valid Current ID.
	Button	2	Please enter at least one of the following fields Current ID, Employer Code, Policy Number, Policyholder SSN, Carrier Number, Recipient SSN, Recipient Last Name, Policyholder Last Name.	Enter a valid Current ID, Employer Code, Policy Number, Policyholder SSN, Carrier Number, Recipient SSN, Recipient Last Name, or Policyholder Last Name.

6.3.5 TPL Mini Search Panel Extra Features

Based upon the number of records identified for the recipient, the next panel displayed is the TPL Information panel for a single record identified, or the TPL Search panel for multiple records. This allows the user to then select the specific TPL Policy to access.

Linking Recipient IDs

If the user enters a Current ID, the panel determines if the ID entered is active. If not, the panel will retrieve and display the records based on the active ID.

6.3.6 TPL Mini Search Panel Accessibility

6.3.6.1 To Access the TPL Mini Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Mini-Search panel display.

6.4 TPL Information Panel Overview

6.4.1 TPL Information Panel Narrative

The Agency uses the TPL Information panel to view health coverage programs information and relative Medicare information that is populated from the eligibility table. This panel is display only.

Navigation Path: [TPL] – [Search] - (Select row from search results) OR
[TPL] - [Information]

6.4.2 TPL Information Panel Layout

6.4.3 TPL Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Absent Parent	Indicator of Absent Parent.	Label	Character	20
Carrier Name	This field contains the business name of an insurance carrier. This allows us to access all insurance carrier information when the carrier gives us only his business name.	Label	Character	45
Carrier Number	An unique identifier used to determine the type of carrier as well as to identify correspondence sent from the carrier.	Label	Character	7
Case	Number used to identify a group of recipients who are in a case.	Label	Character	10
Cost Avoidance Date	The date the cost avoidance indicator was last updated.	Label	Date (MM/DD/CCYY)	8
Current ID	Unique identifier for the recipient.	Label	Number (Integer)	12
Date of Birth	The date of birth for the recipient.	Label	Date (MM/DD/CCYY)	8
Date of Death	The date of death for the recipient.	Label	Date (MM/DD/CCYY)	8
Max End Date	The effective ending date of this coverage code.	Label	Date (MM/DD/CCYY)	8
Min Effective Date	The effective begin date of this coverage code.	Label	Date (MM/DD/CCYY)	8
Policy Number	Policy number for this TPL policy.	Label	Character	30

Field	Description	Field Type	Data Type	Length
Policy Type	This code identifies the type of insurance policy that the recipient is covered under.	Label	Character	1
Policyholder Name	The Policy holder's name.	Label	Character	30
Policyholder SSN	The Policy holder's Social Security Number.	Label	Number (Integer)	9
Recipient Name	The Recipient's name.	Label	Character	30
Recipient SSN	The Recipient's Social Security Number.	Label	Number (Integer)	9
Sex	Identifies the recipient's gender. Valid values include: F = Female M = Male	Label	Character	1
Support Enforcement	The indicator for support of enforcement.	Label	Character	1
Verification Date	The date the suspect code was last updated.	Label	Date (MM/DD/CCYY)	8

6.4.4 TPL Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.4.5 TPL Information Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.4.6 TPL Information Panel Accessibility

6.4.6.1 To Access the TPL Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information panel displays.

6.5 TPL Maintenance Panel Overview

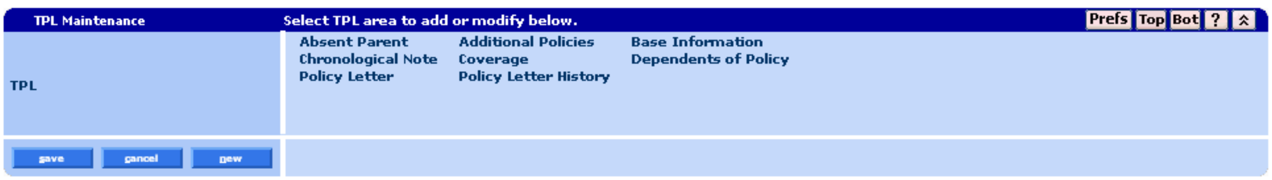
6.5.1 TPL Maintenance Panel Narrative

The TPL Maintenance panel contains links to open other panels in the TPL Information panel.

This panel is inquiry only.

Navigation Path: [TPL] – [Search] - [(Select row from search results)] OR
[TPL - Information]

6.5.2 TPL Maintenance Panel Layout



6.5.3 TPL Maintenance Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Absent Parent	Link to the Absent Parent panel.	Hyperlink	N/A	0
Additional Policies	Link to the Additional Policies panel.	Hyperlink	N/A	0
Base Information	Link to the Base Information panel.	Hyperlink	N/A	0
Cancel	Cancels any change made before they are saved.	Button	N/A	0
Chronological Note	Link to the Chronological Note panel.	Hyperlink	N/A	0
Coverage	Link to the Coverage panel.	Hyperlink	N/A	0
Dependents of Policy	Link to the Dependents of Policy panel.	Hyperlink	N/A	0
New	Create a new, empty base record.	Button	N/A	0
Policy Letter	Link to the Policy Letter panel.	Hyperlink	N/A	0
Policy Letter History	Link to the Policy Letter History panel.	Hyperlink	N/A	0
Save	Saves any updates.	Hyperlink	N/A	0

6.5.4 TPL Maintenance Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.5.5 TPL Maintenance Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.5.6 TPL Maintenance Panel Accessibility

6.5.6.1 To Access the TPL Maintenance Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Maintenance panel displays.

6.6 TPL Absent Parent Panel Overview

6.6.1 TPL Absent Parent Panel Narrative

The TPL Absent Parent panel lists the absent parent information for the TPL resource. The information is display only and cannot be modified on this panel.

This panel is display only.

Navigation Path: [TPL] – [Search] - [(Select row from search results)] - [TPL Maintenance] - [Absent Parent] - OR - [TPL - Information] - [TPL Maintenance] - [Absent Parent]

6.6.2 TPL Absent Parent Panel Layout

6.6.3 TPL Absent Parent Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Absent Parent Address 1	The absent parent's address line 1.	Field	Character	55
Absent Parent First Name	The absent parent's first name.	Field	Character	13
Absent Parent ID	The absent parent's identification number.	Field	Character	7
Absent Parent Last Name	The absent parent's last name.	Field	Character	15

6.6.4 TPL Absent Parent Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Absent Parent First Name (Panel)	Field	1	First Name is required.	Enter a first name.
Absent Parent Last Name (Panel)	Field	1	Last Name is required.	Enter a last name.

6.6.5 TPL Absent Parent Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.6.6 TPL Absent Parent Panel Accessibility

6.6.6.1 To Access the TPL Absent Parent Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information and Maintenance panels display.
6	Click Absent Parent.	Absent Parent panel displays.

6.7 TPL Additional Policies Panel Overview

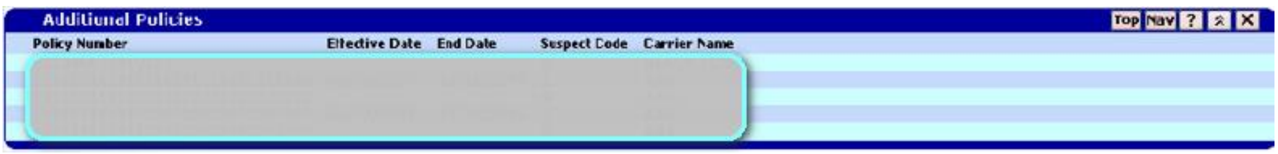
6.7.1 TPL Additional Policies Panel Narrative

The TPL Additional Policies panel contains information about TPL resource. A TPL resource is any entity other than Medicaid that could be responsible for payment of medical benefits for a Medicaid recipient. .

This panel is display only.

Navigation Path: [TPL] – [Search] - [(Select row from search results)] - [TPL Maintenance] - [Additional Policies] - OR - [TPL - Information] - [TPL Maintenance] - [Additional Policies]

6.7.2 TPL Additional Policies Panel Layout



6.7.3 TPL Additional Policies Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Carrier Name	This field contains the business name of an insurance carrier. This allows us to access all insurance carrier information when the carrier gives us only his business name.	Label	Character	45
Effective Date	The effective begin date of this coverage code.	Label	Date (MM/DD/CCYY)	8
End Date	The effective ending date of this coverage code.	Label	Date (MM/DD/CCYY)	8
Policy Number	Policy number for this TPL policy.	Label	Number (Integer)	30
Suspect Code	This code identifies whether a TPL resource is active or suspect and, if suspect, who marked it as suspect (the system or the user).	Label	Character	1

6.7.4 TPL Additional Policies Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.7.5 TPL Additional Policies Panel Extra Features

When a policy is selected, a pop-up window displays the policy for additional maintenance.

6.7.6 TPLAdditional Policies Panel Accessibility

6.7.6.1 To Access the TPL Additional Policies Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information and Maintenance panels display.
6	Click Additional Policies.	Additional Policies panel displays.

6.8 TPL Base Information Panel Overview

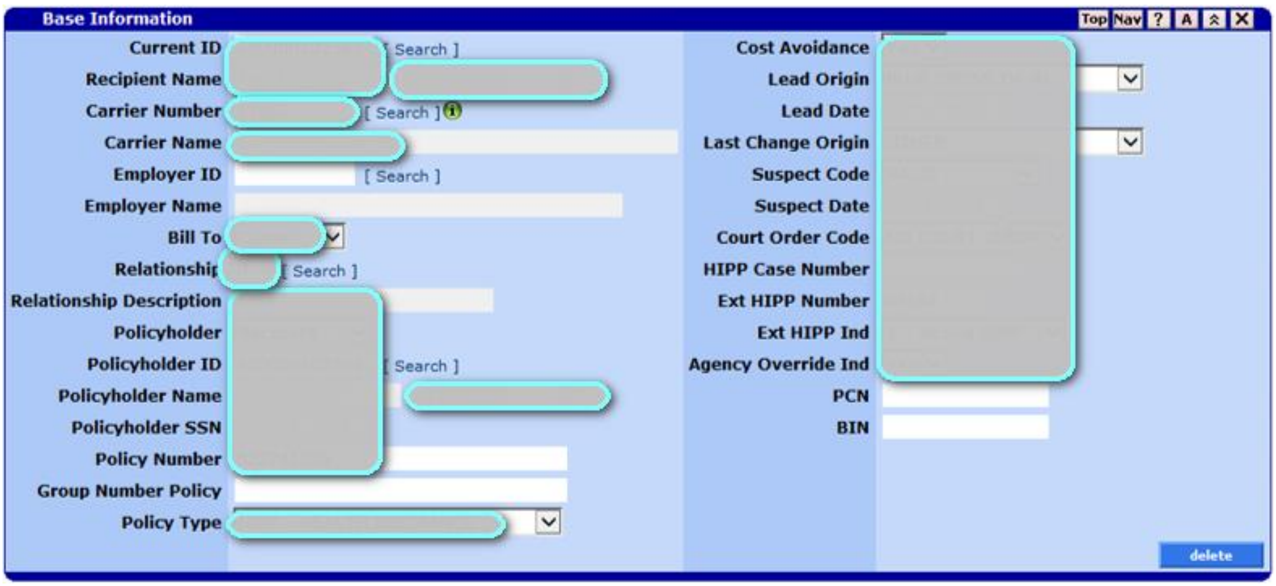
6.8.1 TPL Base Information Panel Narrative

The TPL Base Information panel lists base information about TPL Resource and links to other TPL related information.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Search] - [(Select row from search results)] - [TPL Maintenance] - [Base Information] - OR -[TPL - Information] - [TPL Maintenance] - [Base Information]

6.8.2 TPL Base Information Panel Layout



6.8.3 TPL Base Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Agency Override Indicator	Yes, if a state user has manually updated Ext HIPP Number or Ext HIPP Ind., blank otherwise.	Combo Box	Drop Down List Box	1
Bill To	This code describes who TPL claim facsimiles are billed to: the employer of the policyholder or the carrier.	Combo Box	Drop Down List Box	0
BIN	Pharmacy Coverage BIN Number.	Field	Alphanumeric	15
Carrier Name	This field contains the business name of an insurance carrier. This allows us to access all insurance carrier information when the carrier gives us only his business name.	Field	Character	45

Field	Description	Field Type	Data Type	Length
Carrier Number	An unique identifier used to determine the type of carrier as well as to identify correspondence sent from the carrier.	Field	Character	7
Cost Avoidance	This code indicates if the Policy should utilize Cost Avoidance editing.	Combo Box	Drop Down List Box	0
Court Order Code	This code identifies the court ordered coverage that must be provided by an absent parent.	Combo Box	Drop Down List Box	0
Current ID	Unique identification number for the recipient.	Field	Number	12
Delete	Deletes the current record.	Button	N/A	0
Employer ID	This field is the unique, user-defined employer identification used on all screens and reports to identify the employer.	Field	Character	7
Employer Name	The business name of an employer.	Field	Character	39
Ext HIPP Ind	HMS HIPP Indicator, 1=Member is active in HIPP, 0= Member is not active in HIPP.	Field	Drop Down List Box	1
Ext HIPP Number	HMS HIPP case identifier. This will be the unique identifier for a HIPP case in the PIER system.	Field	Character	8
Group Number Policy	Policy group number. If present, gives the group number of the policy.	Field	Character	30
HIPP Case Number	This identifies the HIPP case number the policy is associated with.	Label	Character	10
Last Change Origin	This code identifies the source of TPL coverage information or the source of changes to existing TPL coverage information.	Combo Box	Drop Down List Box	0
Lead Date	The date the resource was originally added to the system.	Field	Date (MM/DD/CCYY)	8
Lead Origin	This code identifies the source of TPL coverage information or the source of changes to existing TPL coverage information.	Combo Box	Drop Down List Box	0
PCN	Pharmacy Coverage PCN Number.	Field	Alphanumeric	15
Policyholder Name	The last name, first name and middle initial of the policy holder.	Field	Character	19

Field	Description	Field Type	Data Type	Length
Policy Number	Policy number for this TPL policy.	Field	Number (Integer)	30
Policy Type	This code identifies the type of insurance policy that the recipient is covered under.	Combo Box	Drop Down List Box	0
Policyholder	This code identifies whether the policy owner is a Recipient or a Policyholder.	Combo Box	Drop Down List Box	0
Policyholder ID	The identification number for the policy owner.	Field	Character	15
Policyholder SSN	The Social Security Number of the policyholder.	Field	Number (Integer)	9
Recipient Name	Recipient’s last name, first name and middle initial.	Field	Character	19
Relationship	This code identifies the relationship of the policyholder to the recipient covered by a TPL policy.	Field	Character	1
Relationship Description	This field contains the description associated with a specific relationship code.	Field	Character	20
Suspect Code	This field identifies the TPL suspect code which identifies whether a TPL resource is suspect and, if so, how it was determined to be suspect.	Combo Box	Drop Down List Box	0
Suspect Date	The date this resource was marked as suspect.	Field	Date (MM/DD/CCYY)	8

6.8.4 TPL Base Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Carrier Number	Field	1	Carrier Information is required.	Enter a valid Carrier Number or select one from the search list.
	Field	2	This Carrier Number is Inactive.	An active TPL Carrier is required. Please make sure the selected carrier is active.
Cost Avoidance	Field	1	Cost Avoid Indicator Must Be 'N'. (Dispensed when suspect code = invalid or cancelled)	Change Cost Avoidance Indicator to 'N'.
Current ID	Field	1	Recipient ID is required.	Enter a valid Medicare ID (Current ID).

Field	Field Type	Error Code	Error Message	To Correct
HIPP Case Number	Label	1	There is a HIPP Policy associated with this policy. They must be deassociated before this policy may be deleted. Please contact the department that handles HIPP Policies.	Cannot delete HIPP Policy associated with the case.
Ext HIPP Ind	Field	58	If Ext HIPP Indicator is active, the only policy type allowed is HIPP Health Insurance.	Select HIPP Health Insurance as the policy type.
	Field	59	If EXT HIPP Indicator is inactive, the only policy type allowed is Private Pay Health Insurance.	Select Private Pay Health Insurance as the policy type.
	Field	60	Policy has been identified as HIPP recipient. Please select the appropriate policy type.	Select the appropriate policy type.
Lead Origin	Field	1	A valid Lead Origin is required.	Enter a valid Lead Origin.
Policy Type	Field	1	Policy type is required for a valid entry.	Enter a valid Policy Type.
Policyholder	Field	1	Policyholder information is required.	Select a Policyholder from the list.
Policyholder ID	Field	1	Policy Holder ID not found.	Enter a valid Policy holder number.
Policyholder Name	Field	1	Policyholder First Name Required when policyholder type = P and Suspect Code = Valid or Non-Verified.	Please change the policyholder type or enter policyholder first name.
Relationship	Field	1	Please enter a Relationship Code.	Enter a valid Relation Code or select one from the search.
Suspect Code	Field	1	Suspect Code cannot be blank.	Cannot delete HIPP Policy associated with the case.

6.8.5 TPL Base Information Panel Extra Features

Valid vs. Non-Valid Policies

When adding a policy that is not VALID, the following fields are considered required: recipient ID, lead origin and date, suspect code <> VALID.

For a policy to be saved as VALID, it must have the following: recipient id, policyholder, carrier, relationship, policy number, suspect code = VALID, policy type, and coverage with valid coverage dates.

Duplicate Policy Checks

A unique policy is checked on recipient, carrier, and policy number.

Additionally, a check at the coverage level should occur to ensure there are no overlapping coverage dates for the same coverage type.

Possible Duplicate Policy Checks

A unique policy is checked on recipient, carrier, and policy number. If another record exist with the same information, a check against the coverage's are performed. If a match is not found with the coverage code but the dates overlap, a warning message is displayed. The user will determine whether or not to override the error and continue with the save.

Referential Integrity Checks

A policy cannot be deleted if the sak_tpl_resource is cross-referenced to a HIPP case or an AR.

Check for Managed Care

If a VALID or Non-Verified policy is added and the Policy type has a MC Disenroll status, then the Managed Care Patient first segment for that recipient is closed to the end of the current month. These are the only segments closed in this process.

To close the Managed Care segment, the following function rules apply:

The TPLResource Business Entity has a property called PolicyType.DisenrollIndicator which should contain "Y" to terminate Managed Care Patient First program.

Check to see if recip is in a Managed Care pgm that should be terminated when/if recip gets elig for HMO TPL coverage

Query Used:

```
SELECT pmp.sak_re_pmp_assign
from t_re_pmp_assign pmp, t_pub_hlth_pgm pplan
where sak_recip = '" + sak_recip + "'
and pmp.SAK_PUB_HLTH = pplan.SAK_PUB_HLTH
and pplan.cde_pgm_health = 'PT1ST'
and pmp.dte_end >= '" + DateTimeUtil.FormatYYYYMMDD(ChkDate) + "'
and cde_status1 != 'H'" /* don't count segments that were Historied off... */
```

Where sak_recip is the recipient SAK, and ChkDate is the coverage eligibility start date.

Update their PMP assignment with appropriate 'ending info'

Query Used:

UPDATE t_re_pmp_assign
SET cde_rsn_mc_stop = '46', /* '46' Recipient Ineligible due to HMO coverage... */
dte_end = '" + DateTimeUtil.FormatYYYYMMDD(MCDateEnd).ToString() + "'"
dte_termed = '" + DateTimeUtil.FormatMMDDYYYY(DateTime.Today) + "'"
WHERE sak_re_pmp_assign = '" + sakPMP + "'"

Where MCDateEnd is the last day of the current month and sakPMP is the plan internal number.

HIPP Check for Policy Termination

When a TPL Policy is terminated that is associated to a HIPP policy, an alert message must be displayed to the user. The option should be given to terminate the HIPP policy.

Linking Recipient IDs

If the user enters a current ID, the panel determines if the ID entered is active. If not, the panel will save the information under the linked active ID.

If the Recipient subsystem receives a link request and the old sak_recip exists on the t_tpl_resource table, the sak_recip is updated in batch to the active sak_recip.

6.8.6 TPL Base Information Panel Accessibility

6.8.6.1 To Access the TPL Base Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information and Maintenance panels display.
6	Click Base Information.	Base Information panel displays.

6.8.6.2 To Add on the TPL Base Information Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Current ID**.	Recipient name populates on panel.
3	Enter **Carrier Number**.	Carrier name populated on panel.
4	Enter **Employer ID**.	Employer name populates on panel.
5	Select **Bill To** from drop down list box.	
6	Enter **Relationship**. If unknown click [Search].	Relationship Description populates on panel.

Step	Action	Response
7	Select **Policyholder** from drop down list box.	
8	Enter **Policyholder ID**. If unknown click [Search].	
11	Enter **Policy Number**.	
12	Enter **Group Number Policy**.	
13	Select **Policy Type** from drop down list box.	
14	Select **Cost Avoidance** from drop down list box.	
15	Select **Lead Origin** from drop down list box.	
16	Enter **Lead Date** in MM/DD/CCYY format.	
17	Select **Last Change Origi**n from drop down list box.	
18	Select **Suspect Code** from drop down list box.	
19	Enter **Suspect Date** in MM/DD/CCYY format.	
20	Select **Court Order Code** from drop down list box.	
21	Enter **HIPP Case Numbe**r.	
22	Enter **Ext HIPP Ind**.	
23	Select **Agency Override Ind** from drop down list box.	
24	Enter **PCN**.	
25	Enter **BIN.**	
22	Click **Save**.	Base Information is saved.

6.8.6.3 To Update on the TPL Base Information Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	TPL Base Information is saved.

6.8.6.4 To Delete on the TPL Base Information Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.9 TPL Chronological Note Panel Overview

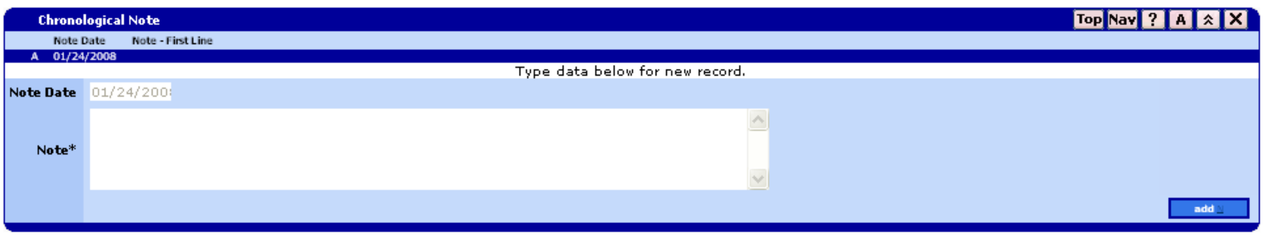
6.9.1 Chronological Note Panel Narrative

The TPL Chronological Note panel contains free-form notes entered by the user or batch processes pertaining to either the casualty case, TPL resource, HIPP Policy or TPL A/R.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Search] - [(Select row from search results)] - [Chronological Note] OR [TPL - Information] - [Chronological Note]

6.9.2 TPL Chronological Note Panel Layout



6.9.3 Chronological Note Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the TPL Chronological Note panel.	Button	N/A	0
Note	This is used for free form text in the chronological notes.	Field	Character	500
Note Date	This identifies the date a particular chronological note was added to the case.	Label	Date (MM/DD/CCYY)	8
Note - First Line	Label of Note - First Line.	Label	N/A	50

6.9.4 Chronological Note Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Note	Field	1	Note is required.	Enter the first line of the note.

6.9.5 Chronological Note Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.9.6 Chronological Note Panel Accessibility

6.9.6.1 To Access the Chronological Note Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information and Maintenance panels display.
6	Click Chronological Note.	Chronological Note panel displays.

6.9.6.2 To Add on the Chronological Note Panel

Step	Action	Response
1	Click **Add**. Note Date automatically populates with current date.	Activates fields for entry of data or selection from lists.
2	Enter **Note**.	
3	Click **Save**.	Chronological Note information is saved.

6.9.6.3 To Update on the Chronological Note Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Chronological Note information is saved.

6.10 TPL Coverage Panel Overview

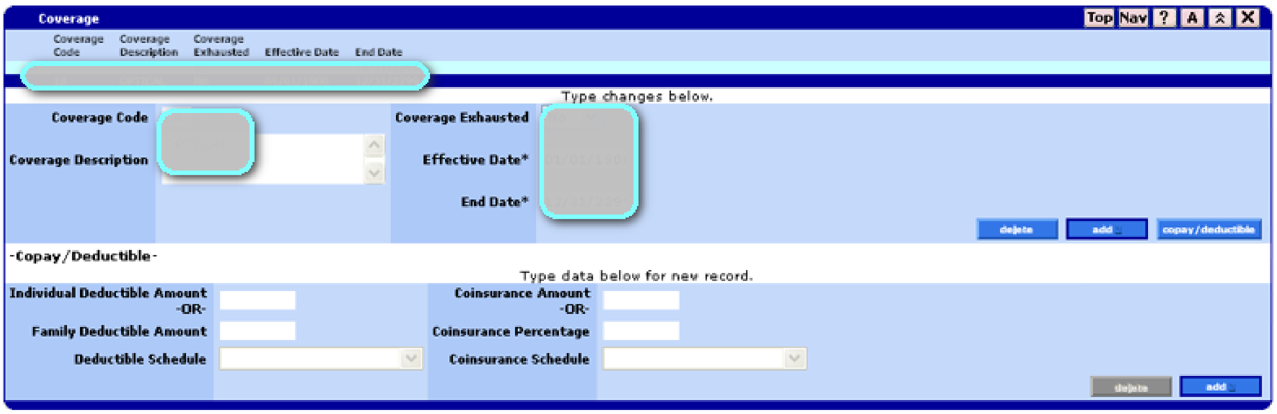
6.10.1 Coverage Panel Narrative

The TPL Coverage panel contains all possible data for TPL Coverage information.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Search] - [(Select row from search results)] - [Coverage] OR [TPL - Information] - [Coverage]

6.10.2 TPL Coverage Panel Layout



6.10.3 TPL Coverage Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add [Copay/Deductible Panel]	Allows the user to add a record to the Copay/Deductible panel.	Button	N/A	0
Add [Coverage Panel]	Allows the user to add a record to the Coverage panel.	Button	N/A	0
Coinsurance Amount [Copay/Deductible Panel]	The coinsurance amount that a recipient is responsible for on a specific coverage type of a policy.	Field	Number (Decimal)	9
Coinsurance Percentage [Copay/Deductible Panel]	The coinsurance percentage that a recipient is responsible for on a specific coverage type of a policy." label="Coinsurance Percentage.	Field	Number (Decimal)	4
Coinsurance Schedule [Copay/Deductible Panel]	This code identifies the schedule for deductible, coinsurance, or premium payments for a specific coverage type of a policy.	Field	Drop Down List Box	0

Field	Description	Field Type	Data Type	Length
Copay/Deductible	This brings up the Copay/Deductible panel.	Button	N/A	0
Coverage Code [Coverage Panel]	This code identifies the type of coverage that a TPL policy provides.	Field	Character	2
Coverage Code [Search]	This allows the user to search for a coverage code.	Hyperlink	N/A	0
Coverage Description [Coverage Panel]	This describes the type of coverage (services) a TPL resource provides.	Field	Character	120
Coverage Exhausted [Coverage Panel]	Coverage Exhausted.	Combo Box	Drop Down List Box	0
Deductible Schedule [Copay/Deductible Panel]	This code identifies the schedule for deductible, coinsurance, or premium payments for a specific coverage type of a policy.	Combo Box	Drop Down List Box	0
Delete [Copay/Deductible Panel]	This allows the user to delete a record from the Copay/Deductible panel.	Button	N/A	0
Delete [Coverage Panel]	This allows the user to delete a record from the Coverage panel.	Button	N/A	0
Effective Date [Coverage Panel]	The effective begin date of this coverage code.	Field	Date (MM/DD/CCYY)	8
End Date [Coverage Panel]	The effective ending date of this coverage code.	Field	Date (MM/DD/CCYY)	8
Family Deductible Amount [Copay/Deductible Panel]	The family deductible amount a recipient is responsible for on a specific coverage type of a policy." Label = Family Deductible Amount.	Field	Number (Decimal)	9
Individual Deductible Amount [Copay/Deductible Panel]	The individual deductible amount a recipient is responsible for on a specific coverage type of a policy.	Field	Number (Decimal)	9

6.10.4 TPL Coverage Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Add	Button	1	Coverage codes 01, 02 and 20 reserved for Medicare.	Select a different coverage code.

Field	Field Type	Error Code	Error Message	To Correct
Coinsurance Amount	Field	2	Cannot have both Coinsurance Amount and Percent.	Check the Coinsurance Percent. If it is greater than zero, then you can not declare amount for the Coinsurance amount.
Coinsurance Percentage	Field	2	Cannot have both Coinsurance Amount and Percent.	Check the Coinsurance amount. If it is greater than zero, then you can not declare a percent for the Coinsurance percent.
Coinsurance Schedule	Field	3	Coinsurance Schedule is Required. Please Enter a Value.	Verify the Coinsurance amount and Percent. If either one is greater than zero, then you must enter a value for coinsurance schedule.
Coverage Code	Field	1	A valid Coverage Code is required.	Enter a valid coverage code or click search and select one from the list.
	Field	2	Date and Code range segments for existing Coverage cannot overlap.	Change the coverage code or dates so it does not overlap with an existing span.
Deductible Schedule	Field	4	Deductible Schedule is Required. Please Enter a Value.	Verify the values of Individual Deductible Amount and Family Deductible Amount. If either one is greater than zero, then you must enter a value for the Deductible Schedule.
Effective Date	Field	1	Effective Date must be greater than or equal to 01/01/1900.	Insert date in proper format greater than or equal to 01/01/1900.
	Field	2	End Date must be greater than or equal to 01/01/1900.	Insert date in proper format greater than or equal to 01/01/1900.
	Field	3	Effective Date [Date] must be less than or equal to End Date [Date].	Enter the effective date where its value is less than End date value.
	Field	4	End Date is required.	Enter a valid End Date.
End Date	Field	3	Effective Date [Date] must be less than or equal to End Date [Date].	Enter the End date where its value is greater than effective date value.
	Field	4	End Date is required.	Enter a valid end date.
Family Deductible Amount	Field	1	Cannot have both Ind and Family Deductible Amount.	Check the individual deductible amount. If it is greater than zero, you can not put any amount for the family deductible amount.
Individual Deductible Amount	Field	1	Cannot have both Ind and Family Deductible Amt.	Check the family deductible amount. If it is greater than zero, you can not put any amount for the individual deductible amount.

6.10.5 TPL Coverage Panel Extra Features

For the same coverage code, dates of service cannot overlap.

The copay/deductible button expands the panel to allow the user to key additional data about the policy.

Managed Care assignment will be ended and stored historically in the following way:-

1) This logic only applies to Patient 1st.

2) MC assignment will be ended by end-of-month of the MC Effective Date if MC Effective Date is in the future and TPL coverage date overlaps the MC Effective Date.

3) MC assignment will be ended by end-of-month of current date and the MC assignment will be marked as History if MC Effective Date is in the past, MC End Date is in the future, and TPL Effective Date is less then MC Effective Date, but TPL End Date is greater than MC Effective Date.

4) MC assignment will be ended by end-of-month previous to TPL effective date if MC Effective Date is in the past, MC End Date is in future and TPL Effective Date is also in past, but is greater than MC Effective Date but less than the MC End Date.

5) MC assignment will be stored historically when the TPL Effective Date is less than the MC Effective Dates and TPL End Date is greater than or equal to the MC Effective Date.

6) No changes will be made to MC assignments already with status as history.

6.10.6 TPL Coverage Panel Accessibility

6.10.6.1 To Access the TPL Coverage Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information and Maintenance panels display.
6	Click Coverage.	Coverage panel displays.

6.10.6.2 To Add on the TPL Coverage Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Coverage Code. If unknown, click [Search] to locate by selecting row from search results.	Coverage Code and Description are populated.
3	Select **Coverage Exhausted** from drop down list.	
4	Enter **Effective Date** in MM/DD/CCYY format.	
5	Enter **End Date** if different than date automatically populated in MM/DD/CCYY format.	
6	Click **Save**.	Coverage information is saved.

6.10.6.3 To Update on the TPL Coverage Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Coverage information is updated.

6.10.6.4 To Delete on the TPL Coverage Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.10.6.5 To Add Co-Pay/Deductible Information

Step	Action	Response
1	Click Copay/Deductible.	Copay/Deductible panel displays below Coverage panel.
2	Click **Add**.	Activates fields for entry of data or selection from lists.
3	Enter Individual Deductible Amount OR Family Deductible Amount.	
4	Select **Deductible Schedule** from drop down list.	
5	Enter Coinsurance Amount OR Coinsurance Percentage.	
6	Select **Coinsurance Schedule** from drop down list.	
7	Click **Save**.	Copay/Deductible information is saved.

6.10.6.6 To Update Co-Pay/Deductible Information

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Copay/Deductible information is updated.

6.10.6.7 To Delete Co-Pay/Deductible Information

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.11 TPL Dependents of Policy Panel Overview

6.11.1 Dependents of Policy Panel Narrative

The TPL Dependents of Policy displays all TPL policies that exist for the same policy number and carrier.

This panel is display only.

Navigation Path: [TPL] – [Search] - [(Enter search criteria)] - [(Select row from search results)] - [TPL Maintenance] - [TPL] - [Dependents Of Policy] OR [TPL - Information] - [Dependents Of Policy]

6.11.2 TPL Dependents of Policy Panel Layout

6.11.3 TPL Dependents of Policy Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Current ID	Unique identifier for the recipient.	Field	Character	12
First Name	The first name of the recipient.	Field	Character	13
Recipient DOB	The recipient's date of birth.	Field	Date (MM/DD/CCYY)	10
Recipient Last Name	The last name of the recipient.	Field	Character	15
Recipient SSN	The recipient's Social Security Number.	Field	Number (Integer)	9

6.11.4 TPL Dependents of Policy Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.11.5 TPL Dependents of Policy Panel Extra Features

When selecting a row on the panel, the system pops-up into another session of the TPL Policy.

6.11.6 TPL Dependents of Policy Panel Accessibility

6.11.6.1 To Access the TPL Dependents of Policy Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search.**	TPL Search panel displays.

Step	Action	Response
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information and Maintenance panels display.
6	Click Dependents of Policy.	Dependents of Policy panel displays.

6.12 TPL Policy Letter Panel Overview

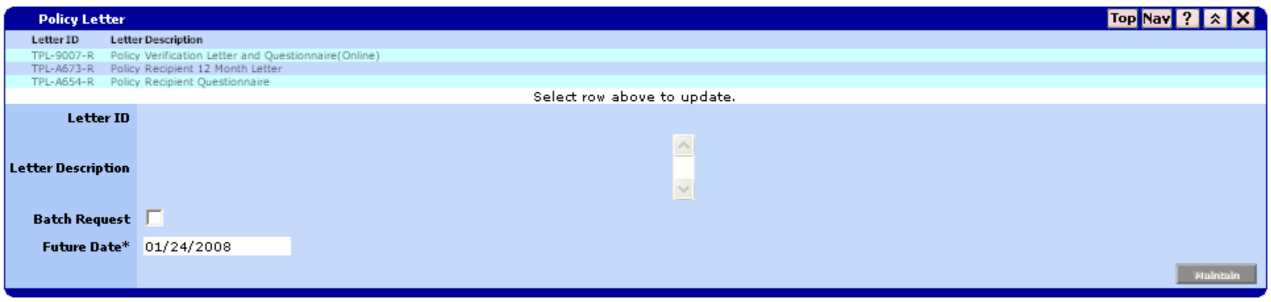
6.12.1 TPL Policy Letter Panel Narrative

The TPL Policy Letter panel allows the user to select a letter to send for the policy.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Search] - (Select row from search results) - [TPL Maintenance] - [Policy Letter] - OR -[TPL - Information] - [TPL Maintenance] - [Policy Letter]

6.12.2 TPL Policy Letter Panel Layout



6.12.3 TPL Policy Letter Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Batch Request	When the checkbox is clicked, the batch is requested.	Combo Box	Drop Down List Box	0
Future Date	The expected date of the letter to be batched.	Field	Date (MM/DD/CCYY)	8
Letter Description	The description of the letter.	Field	Character	4000
Letter ID	The identification number of the letter.	Field	Character	10
Maintain	Allows the user to manually request a letter.	Button	N/A	0

6.12.4 TPL Policy Letter Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.12.5 TPL Policy Letter Panel Extra Features

As a standard, all Policy letters begin with the description of 'Pol%' and the ID of the letter begins with 'TPL-'. This allows the system to automatically pick up any newly added letters to the system.

Based upon the schema described above, the extract for this panel is a query against the T_LG_LETTER_TEMPLATE table for the ID_LETTER and DSC_LETTER fields.

Once a letter is selected, the system passes the sak_tpl_resource to the letter generator as a parameter. This is stored on the T_LG_LETTER_REQUEST table as the ID_PEOPLE and used to retrieve the data needed to populate the letter.

6.12.6 Policy Letter Panel Accessibility

6.12.6.1 To Access the TPL Policy Letter Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search.**	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information and Maintenance panels display.
6	Click Policy Letter.	Policy Letter panel displays.

6.12.6.2 To Maintain a Letter on the TPL Policy Letter Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click Maintain.	Login window displays.
3	Enter User name and Password.	
4	Click **OK**.	Letter generator opens with a message requesting the user to select: To open the PDF Save the PDF Cancel

6.13 TPL Policy Letter History Panel Overview

6.13.1 TPL Policy Letter History Panel Narrative

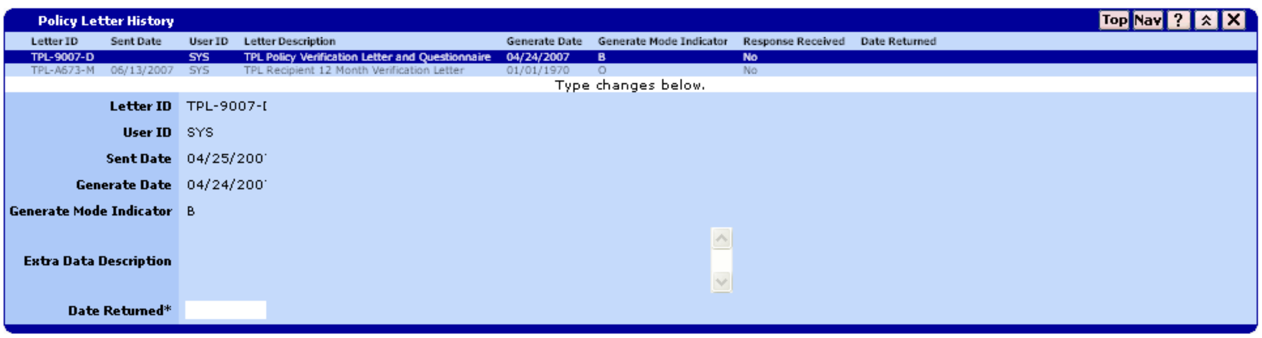
The TPL Policy Letter History panel displays the history of all letters that have been sent for this TPL policy.

This panel does not display history for HIPP, Cases or ARs, and that it only displays for this policy.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Search] - (Select row from search results) - [TPL Maintenance] - [Policy Letter History] - OR -[TPL] – [Information] - [TPL Maintenance] - [Policy Letter History]

6.13.2 TPL Policy Letter History Panel Layout



6.13.3 TPL Policy Letter History Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Date Returned	The date the response was returned.	Field	Date (MM/DD/CCYY)	8
Extra Data Description	Gives additional description about the request.	Field	Character	4000
Generate Date	Contains the date the letter was generated	Field	Date (MM/DD/CCYY)	8
Generate Mode Indicator	Indicates the mode in which the letter was generated (O for Online, B for Batch).	Field	Character	1
Letter Description	The description of the letter.	Listview	Character	55
Letter ID	The external identifier for this letter	Field	Character	20
Response Received	Yes or No indicator showing whether a response has or has not been received for this letter.	Listview	Character	3

Field	Description	Field Type	Data Type	Length
Sent Date	The date the letter was created and printed.	Field	Date (MM/DD/CCYY)	8
User ID	The user who requested the letter.	Field	Character	8

6.13.4 TPL Policy Letter History Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Date Returned	Field	1002	Date Returned is required.	Enter a valid returned date.

6.13.5 TPL Policy Letter History Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.13.6 TPL Policy Letter History Panel Accessibility

6.13.6.1 To Access the TPL Policy Letter History Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search.**	TPL Search panel displays.
3	Enter Search criteria.	
4	Click **Search**.	Search results displays.
5	Click row to display information.	TPL Information and Maintenance panels display.
6	Click Policy Letter History.	Policy Letter History panel displays.

6.13.6.2 To Update on the TPL Policy Letter History Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Policy Letter information is updated.

6.14 TPL AR Search Panel Overview

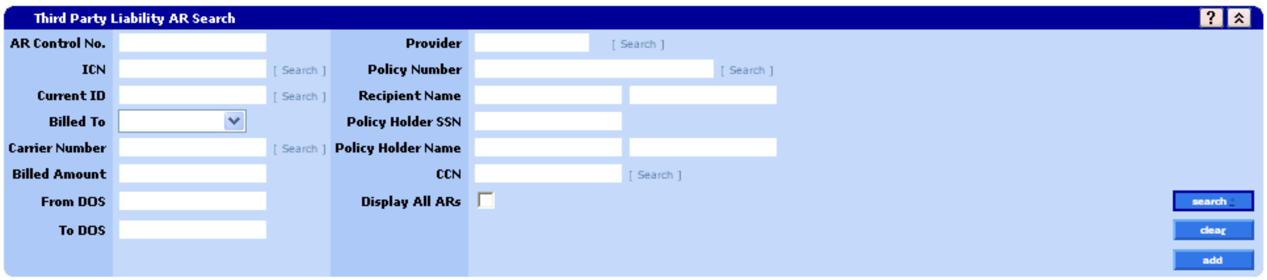
6.14.1 TPL AR Search Panel Narrative

The TPL AR Search Panel is used to search for Account Receivable records using various criteria.

This panel is inquiry on ly.

Navigation Path: [TPL] - [AR Search]

6.14.2 TPL AR Search Panel Layout



6.14.3 TPL AR Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
AR Control No.	The internal accounts receivable control number.	Field	Character	13
Billed Amount	The amount that is expected to be received due to the A/R.	Field	Number (Decimal)	9
Billed To	The entity that was billed for the accounts receivable.	Combo Box	Drown Down List Box	1
Carrier Number	Insurance carrier identification number related to this A/R.	Field	Character	7
CCN	Cash control number of the check that has been dispositioned.	Field	Number (Integer)	11
Clear	Clears the search panel.	Button	N/A	0
Current ID	The unique identifier for the recipient.	Field	Number (Integer)	12
Display All ARs	This field is checked when the user wants all account receivable records to be displayed.	Combo Box	Checkbox	0
From DOS	The beginning date of service for the claim.	Field	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
ICN	The Internal Control Number that identifies the claim assigned to the A/R.	Field	Number (Integer)	13
Policy Holder Name (First)	The first name of the policy holder.	Field	Character	19
Policy Holder Name (Last)	The last name of the policy holder.	Field	Character	19
Policy Holder SSN	The Social Security Number of the policy holder.	Field	Number (Integer)	9
Policy Number	Policy number for the insurance policy.	Field	Character	30
Provider	The billing provider identification number.	Field	Number (Integer)	15
Recipient Name (First)	The first name of the recipient.	Field	Character	19
Recipient Name (Last)	The last name of the recipient.	Field	Character	19
Search	Searches for records based on entered criteria.	Button	N/A	0
To DOS	The ending date of service for the claim.	Field	Date (MM/DD/CCYY)	8

6.14.4 TPL AR Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Search	Button	1	Please enter at least one search field.	Enter a search field in search panel before clicking search.
AR Control No	Field	5	AR Control No. must be numeric	Enter the numeric internal accounts receivable control number.
Billed Amount	Field	4	Enter a valid value.	Enter a valid dollar amount.
Carrier Number	Field	1	Carrier Number must be numeric.	Enter a numeric Carrier Number.
	Field	3	A Carrier Number is required to Display All ARs.	Please enter a Carrier Number.
Current ID	Field	6	Current ID must be numeric.	Enter a numeric ID.
From DOS	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter the date in the correct format.

Field	Field Type	Error Code	Error Message	To Correct
	Field	2	Both From DOS and To DOS must be entered.	Enter a value for both fields.
	Field	3	FDOS cannot be greater than TDOS.	Check values and re-enter valid dates.
ICN	Field	1	ICN must be 13 numeric digits.	Enter a valid ICN.
	Field	13	ICN must be numeric.	Enter a valid ICN.
Policy Holder Name (First)	Field	10	Policy Holder First Name contains invalid characters.	Enter a valid name.
Policy Holder Name (Last)	Field	12	Policy Holder Last Name contains invalid characters.	Enter a valid name.
	Field	15	Last Name must be used to search by Policyholder Name.	Enter a valid name.
Policy Holder SSN	Field	1	Enter a valid value.	Enter a valid SSN.
Provider	Field	1	Provider ID must be 8 numeric digits.	Enter a valid Provider ID.
Recipient Name (First)	Field	10	Recipient First Name contains invalid characters.	Enter a valid name.
Recipient Name (Last)	Field	1	Last Name must be used to search by Recipient Name.	Enter recipient's last name.
	Field	9	Recipient Last Name contains invalid characters.	Enter a valid last name.
To DOS	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter the date in the correct format.
	Field	4	Both From DOS and To DOS must be entered.	Enter a value for both fields.

6.14.5 TPL AR Search Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.14.6 TPL AR Search Panel Accessibility

6.14.6.1 To Access the TPL AR Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search.**	TPL AR Search panel displays.

6.14.6.2 To Navigate on the TPL AR Search Panel

Step	Action	Response
1	Enter Search criteria.	
2	Click **Search.**	Results of search displays.
3	Select row from search results.	TPL Information and Maintenance panels display.

6.15 TPL AR Search Results Panel Overview

6.15.1 TPL AR Search Results Panel Narrative

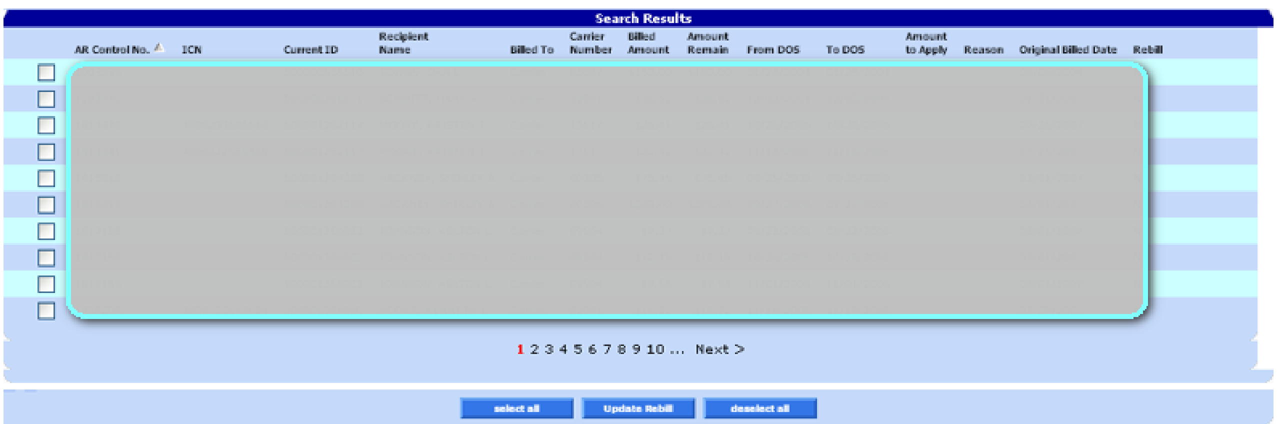
The TPL AR Search Results Panel is used to display the results of searches for accounts receivables.

To post cash, click the check box for all affected A/Rs. Also displayed with the search panel is the AR Allocation panel to identify the CCN to allocate against. Once the A/Rs are selected, and the CCN information has been identified, the user can allocate based upon the various options given. See the AR Allocation panel for a description of those options.

This panel is display only.

Navigation Path: [TPL] – [AR Search] - (Enter in search criteria) - (Click on search)

6.15.2 TPL AR Search Results Panel Layout



6.15.3 TPL AR Search Results Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Amount Remain	The amount remaining for this accounts receivable.	Field	Number (Decimal)	9
Amount to Apply	The amount to be applied for this A/R.	Field	Number (Decimal)	9
AR Control No	The internal accounts receivable number assigned to the claim or transaction.	Field	Number (Integer)	13
Billed Amount	Dollar amount of the claim billed under the accounts receivable.	Field	Number (Decimal)	9
Billed To	Entity that was billed for the accounts receivable.	Field	Character	15

Field	Description	Field Type	Data Type	Length
Carrier Number	Insurance carrier identification number related to this accounts receivable.	Field	Character	7
Current ID	The Agency assigned identification number of the recipient associated with the A/R.	Field	Character	12
Deselect All	Allows the user to unselect all records in search results.	Button	N/A	0
From DOS	The beginning date of service for the claim.	Field	Date (MM/DD/CCYY)	8
ICN	The Internal Control Number that identifies the claim assigned to the A/R.	Field	Number (Integer)	13
Original Billed Date	Shows the initial bill date.	Field	Date (MM/DD/CCYY)	8
Reason	The A/R reason code last used on the A/R.	Field	Character	4
Rebill Ind	Indicates whether a rebill has been requested for the AR.	Field	Character	1
Recipient Name	The last, first name and middle initial of the recipient.	Field	Character	29
Select All	Allows selection of all records in search results.	Button	N/A	0
To DOS	The ending date of service for the claim.	Field	Date (MM/DD/CCYY)	8
Update Rebill	Allows the user to update rebill records in the search results.	Button	N/A	0

6.15.4 TPL AR Search Results Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.15.5 TPL AR Search Results Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.15.6 TPL AR Search Results Panel Accessibility

6.15.6.1 To Access the TPL AR Search Results Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL Information panel displays.

6.16 AR Disposition Selection Panel Overview

6.16.1 AR Disposition Selection Panel Narrative

The AR Disposition Selection panel displays the accounts receivables selected on the TPL AR Search panel to be dispositioned. This panel is display only.

Navigation: [TPL] - [AR Search] - [Select from Search Results] - [Identified CCN] - [Button to Disposition]

6.16.2 AR Disposition Selection Panel Layout

6.16.3 AR Disposition Selection Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
AR Control No.	Accounts receivable that was selected from the prior panel for processing.	Field	Alphanumeric	13
Amount Remain	Amount remaining on the accounts receivable in dollars.	Field	Number (Decimal)	10
Billed Amount	Original billed amount of the accounts receivable in dollars.	Field	Number (Decimal)	10
Billed To	Billed To name for the accounts receivable.Typically carrier, provider, recipient, policyholder, etc.	Field	Character	20
Carrier Number	Carrier identification number.	Field	Number (Integer)	7
Current ID	This is the current identification number of the recipient.	Field	Number (Integer)	12
From DOS	This is the From Date of Service on the claim.	Field	Date (MM/DD/CCYY)	8
ICN	This is the internal control number for the accounts receivable.	Field	Number (Integer)	13
To DOS	This is the To Date of Service on the Claim.	Field	Date (MM/DD/CCYY)	8

6.16.4 AR Disposition Selection Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.16.5 AR Disposition Selection Panel Extra Features

Note that for the layout, the selection panel is just the top portion displayed. The other sections are utilized through the processing of A/Rs, and become active as each A/R is selected at the top.

6.16.6 AR Disposition Selection Panel Accessibility

6.16.6.1 To Access the AR Disposition Selection Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL Information panel displays. AR Disposition selection panel is located directly above the TPL Information panel.

6.17 TPL AR Information Panel Overview

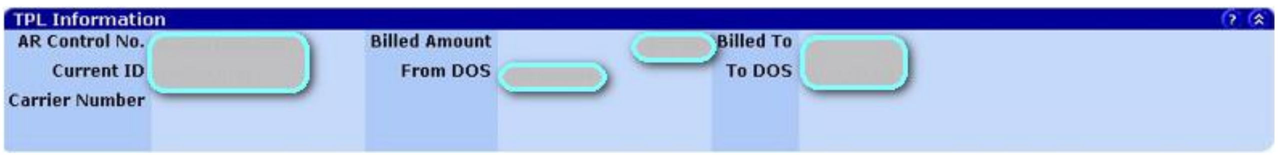
6.17.1 TPL AR Information Panel Narrative

The TPL AR Information panel describes the basic information about an accounts receivable in order to accommodate all outstanding payments from the current MMIS. A/R requires the capability of accepting a manual entry at the recipient, carrier, or policyholder level.

This panel is display only.

Navigation Path: [TPL] – [AR Search] - [(Enter search criteria)] - [(Select a record from Search Results)] - [TPL Information]

6.17.2 TPL AR Information Panel Layout



6.17.3 TPL AR Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
AR Control No.	The internal accounts receivable control number for which dispositions are listed. (RRYYDDDBBBSSS) TPL has a region code of 61 and the batch range is 900-950 from the system generated billings or a batch range of 951-999, if a manual accounts receivable set-up.	Field	Number (Integer)	13
Billed Amount	Amount of the accounts receivable.	Field	Number (Decimal)	9
Billed To	Entity that was billed for the accounts receivable.	Field	Character	15
Carrier Number	Insurance carrier identification number related to this accounts receivable.	Field	Character	7
Current ID	The Agency assigned identification number of the recipient associated with the accounts receivable.	Field	Character	12
From DOS	The beginning date of service for the claim.	Field	Date (MM/DD/CCYY)	8
To DOS	The ending date of service for the claim	Field	Date (MM/DD/CCYY)	8

6.17.4 TPL AR Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.17.5 TPL AR Information Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.17.6 TPL AR Information Panel Accessibility

6.17.6.1 To Access the TPL AR Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL Information panel displays.

6.18 TPL AR Maintenance Panel Overview

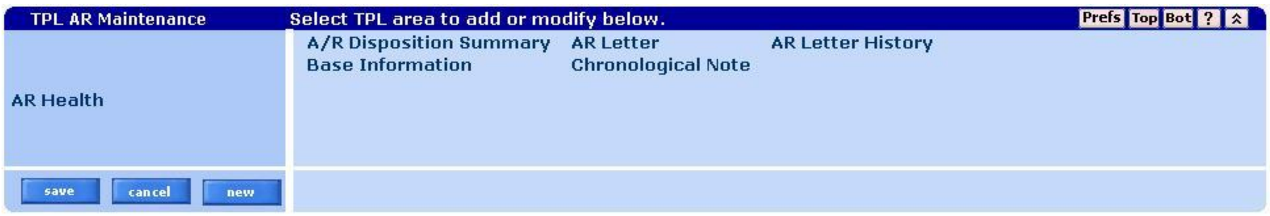
6.18.1 TPL AR Maintenance Panel Narrative

The TPL AR Maintenance panel is the point of access for TPLs requiring maintenance.

This panel is inquiry only.

Navigation Path: [TPL] – [A/R Search] - [(Enter search criteria)] - [(Select a row from Search Results)] - [TPL AR Maintenance]

6.18.2 TPL AR Maintenance Page Layout



6.18.3 TPL AR Maintenance Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
A/R Disposition Summary	Link to the AR Disposition Summary panel.	Hyperlink	N/A	0
AR Letter	Link to the AR Letter hyperlink.	Hyperlink	N/A	0
AR Letter History	Link to the AR Letter History panel.	Hyperlink	N/A	0
Base Information	Link to the Base Information panel.	Hyperlink	N/A	0
Cancel	Cancels an update.	Button	N/A	0
Chronological Note	Link to the Chronological Note panel.	Hyperlink	N/A	0
New	Opens the Base Information Panel for a new accounts receivable.	Button	N/A	0
Save	Saves an update.	Button	N/A	0

6.18.4 TPL AR Maintenance Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.18.5 TPL AR Maintenance Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.18.6 TPL AR Maintenance Panel Accessibility

6.18.6.1 To Access the TPL AR Maintenance Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search.**	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search.**	Search results display.
5	Select row from search results.	TPL Maintenance panels display.

6.19 TPL AR Allocation Panel Overview

6.19.1 TPL AR Allocation Panel Narrative

The TPL AR Allocation panel is used to identify a Cash Control Number (CCN) in the Financial Subsystem so that it can be applied to a TPL Accounts Receivable (A/R).

Only authorized users are allowed to perform maintenance tasks on this panel.

The Auto Apply button may be used to apply money to all ARs listed on the window until the Amount Available is equal to zero. The Auto Apply feature may be used when the CCN and percentage along with a valid disposition reason code have been entered in the Allocation Panel and the ARs listed have no Disposition History and are not denied.

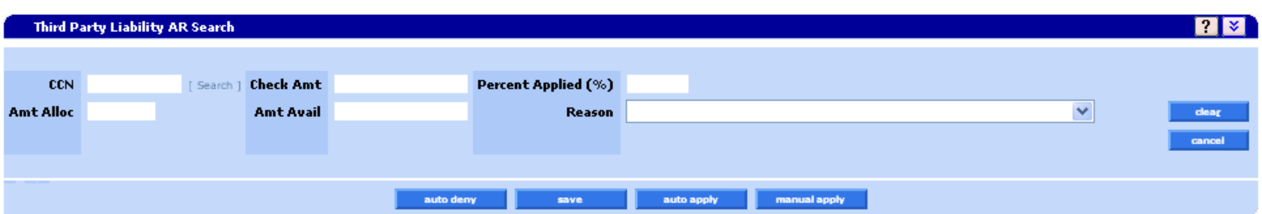
Money will be applied to selected (checked) ARs in the order that appears on the window. The amount of money applied is determined by: The Percent Applied based on the AR's amount remaining. If there is not enough money in the Check (CCN) to cover the required amount, the remaining available money will be applied to the AR.

The Auto Deny button may be used to deny all ARs listed on the window. A reason code is required and it cannot be a disposition or Expenditure reason code. Those AR's with Bill To = 'P' cannot be auto denied. Only ARs that have no Disposition History and have not previously been denied, are eligible for Auto Deny.

If he Check's available money exceeds the required amount to cover all selected AR's. The panel will ask the user if an Expenditure needs to be created. If the user opts to create an Expenditure, a Financial Panel will be called to complete the procedure.

Navigation Path: [TPL] – [AR Search] - [Enter Search criteria and click on Search]

6.19.2 TPL AR Allocation Panel Layout



6.19.3 TPL AR Allocation Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Amt Alloc	Dollar amount of the check allocated to this point.	Field	Number (Decimal)	9
Amt Avail	Dollar amount of the check that is available at this point.	Field	Number (Decimal)	9
Auto Apply	The Auto Apply button may be used to apply money to all A/Rs listed on	Button	N/A	0

Field	Description	Field Type	Data Type	Length
	the panel until the Amount Available is equal to zero.			
Auto Deny	The Auto Deny button may be used to deny all A/Rs listed on the window with reason code '80' except those where the Bill To = 'P'. A/Rs that have no Disposition History are eligible for Auto Deny.	Button	N/A	0
Cancel	Cancels the current changes.	Button	N/A	0
CCN	Cash control number of the check that is to be dispositioned.	Field	Number (Integer)	11
Check Amt	Total dollar amount of the check received.	Field	Number (Decimal)	9
Clear	Clears the auto apply/deny panel.	Button	N/A	0
Manual Apply	Initiates the Manual Apply process and takes the user to the Adjustments Search panel.	Button	N/A	0
Percent Applied (%)	Percentage of the claim that the carrier has paid.	Field	Number (Decimal)	4
Reason	Reason drop down box.	Combo Box	Drop Down List Box	0
Save	Save the active record(s).	Button	N/A	0

6.19.4 TPL AR Allocation Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Auto Apply	Button	1	An A/R and a valid CCN must selected for disposition.	Select an A/R and a valid CCN.
	Button	2	AR Control number[#######] already has a disposition. For additional dispositions, use the AR Disposition Summary Panel.	The selected AR already has a disposition. AutoApply cannot be used on this AR. Use the AR Disposition Summary panel to add more dispositions.
	Button	3	AR Control number[#######] record already processed, cannot use AutoApply.	Record has already been processed. AutoApply cannot be used on this AR.
	Button	4	Available money was not enough to apply to all selected AR's.	Amount on the selected CCN was not enough to fully cover all selected ARs.
	Button	5	Would you like to create an expenditure?	After the AutoApply process completes it determines if there is amount remaining

Field	Field Type	Error Code	Error Message	To Correct
				on the CCN. If so, the panel asks the user if an Expenditure should be created.
	Button	6	Review the amount to be applied and then press the save button to apply the monies.	This message notifies the user the Save button must be pressed to apply the changes to the affected ARs.
	Button	7	Amount must be greater than zero.	The selected AR does not have a Remaining amount greater than zero. Therefore, autoapply can not be applied to this AR.
Auto Deny	Button	1	At least one AR row must be selected.	Select an AR and repeat process.
	Button	2	Cannot have a CCN assigned on Autodeny.	CCN must be cleared before auto denying an AR.
	Button	3	Cannot have a Percent Applied on Autodeny.	Percentage must be cleared before AutoDenying an AR.
	Button	4	Please select a Reason to explain Auto Deny.	AutoDeny requires a Deny reason to apply to the AR.
	Button	5	Selected Reason cannot be applied with Auto Deny.	Reason codes A, E, M, R, & U cannot be used with AutoDeny.
	Button	6	AR Control number[#######] record already processed, cannot use Autodeny.	Record has already been denied or has a disposition. This record cannot be deny using AutoDeny.
	Button	7	AR Control number[#######] has disposition history. Auto deny cannot be applied to this TPL AR.	The selected AR already has a disposition. This AR cannot be AutoDeny.
	Button	8	Auto deny cannot be applied to TPL ARs billed to Provider.	ARs billed to the Provider cannot be AutoDenied.
	Button	9	Nothing was Auto-denied.	After the AutoDeny process completed it was determined, no AR records were updated.
	Button	10	Click on save to auto deny TPL AR payment.	This is an informational Message, the user must Save the record(s) in order for the changes to be reflected.

Field	Field Type	Error Code	Error Message	To Correct
Percent Applied (%)	Field	1	Percent Applied is required.	Enter a valid percent value.
	Field	2	Percent Applied is not valid.	Enter a percentage between 0 and 100%.
CCN	Field	1	CCN cannot be used. It has a Non-Sufficient Fund status.	CCN has a non-sufficient funds status. This CCN cannot be used, pick another CCN.
	Field	2	CCN's Check amount must be greater than zero.	CCN's amount has been depleted. Select another CCN with enough amount to cover the AR(s) amount.
	Field	3	CCN not found or not a TPL type.	CCN does not have the correct unit of 200 for TPL or 250 for HIPP. If the CCN is correct, check with Financial determine if unit on CCN needs to be updated.
Reason	Combo Box	1	Please select a valid Reason code.	Reason Code must be selected.
	Combo Box	2	Select a valid reason code for dispositions.	For Disposition, reason codes must be R, E, M, or U. So select one of these reasons.
	Combo Box	3	Cannot use this reason code: Reason Code 'A' is exclusive for Expenditures.	A reason code is exclusive for Expenditures. Select another reason.
	Combo Box	2	Select a valid reason code for dispositions.	For Disposition, reason codes must be R, E, M, or U. So select one of these reasons.
	Combo Box	3	Cannot use this reason code: Reason Code 'A' is exclusive for Expenditures.	A reason code is exclusive for Expenditures. Select another reason.
Save	Button	1	Unable to find TPL AR Health entity for AR Control number[#######].	TPL AR record does not exits.
	Button	2	A claim was adjusted and you indicated not to continue.	When a claim is adjusted the user has the chance to continue processing the AR. If the user selected No, the panel will cancel he saving process.
	Button	3	Database Transaction could not be created, please call Technical Support.	The Oracle transaction was not created successfully.

Field	Field Type	Error Code	Error Message	To Correct
				There is a potential problem with the database.
	Button	4	Unable to find TPL AR Health entity for TPL AR Control number[#######].	AR Record could not be found.
	Button	5	Control number[#######] record already processed. Use AR Disposition Summary Panel to dispose from this AR.	The record was already either denied or autoapplied before this time. It will need to be edited from the TPL AR Maintenance Panel.
	Button	6	No reason with that code was found for reason used in AR number: #######.	AR reason selected could not be found in the reasons table.
	Button	7	Control number[######] has disposition history. Changes cannot be applied to this TPL AR.	The AR has dispositions already, the changes cannot be applied to this AR.
	Button	8	Amount must be zero for Denied AR Control number[######]. Select and press Cancel to clear amount.	During save, it was found an AR to be denied contained an amount. This must be cleared using the Cancel Button.
	Button	9	Could not update AR. Control number[#######] could not be updated.	An error occurred during the save of the indicated AR.
	Button	10	Save Failed: No TPL ARs were updated.	Errors occurred and none of the TPL ARs were saved.
	Button	11	Save Successful: ## TPL ARs were updated.	All records were updated.
	Button	12	Only ## TPL ARs were updated.	There were some errors but some TPL ARs were successfully saved.
	Button	13	Cannot Start CashRecipt Service.	Financial Service could not be started. Contact the financial Team.
	Button	14	An error occurred while updating Cash Disposition.	The Financial Disposition was not created. Contact Financial.
	Button	15	CCN information is required to persist Auto Applied records.	CCN was not provided while TPL AR records had amount to apply. CCN is required to take the money from it.
	Button	16	Cannot update AR record: [#######].	TPL AR was not saved.

Field	Field Type	Error Code	Error Message	To Correct
	Button	17	Invalid AR disposition.	TPL AR disposition was not created. Try again.
	Button	18	TPL AR Control number [#####] already has a disposition. For additional dispositions, use the AR Disposition Summary Panel.	AR already has disposition. Verify. Add additional data via the AR Disposition Summary Panel.

6.19.5 TPL AR Allocation Panel Extra Features

[Search] Allows the user to display a pop-up search panel to search for a CCN in Financial.

CCN Search should restrict to Unit of '200' - TPL, and also for those CCNs that have not been fully dispositioned.

The CCN amount can be applied in one of the following methods:

1) Auto Apply, which begins with the first AR, dispositions fully until money runs out. This method requries the user to select one or more ARs from the result page, enter the CCN, Percentage and a valid reason code for Dispositions. Failure to enter this information will result on error messages posted by the panel.

2) Manual Apply - this method will take all selected ARs to the AR Maintenance panel so the user can enter Dispositions individually.

The only requirement for this Method is to select one or more AR from the Search results.

Other features:

Auto Deny - Auto Deny will deny the selected ARs using the selected Deny Reason. The reason code cannot be a Disposition or Expenditure reason.

Save button - this button will apply to database any changes made with the AutoApply or AutoDeny buttons. Once this button is pressed, there is no way of roll back the changes.

Clear Button - This button will clear all fields on the Allocation Panel.

Cancel Button - this button will clear the amount and reason codes applied with Autoapply. Note that existing reasons will not be cleared with this button.

Update Rebill - this button will update the Rebill indicator to the selected ARs. If this button is selected and the Rebill indicator is Y it will be set to 'N', and viceversa. Note that in contrast of the AutoApply or AutoDeny buttons, this button will update the database directly.

Select All - this button selects all records displayed on the result page. Note this function does not select all pages of results. This feature will be implemented in future releases of the panel.

Deselect All - this button will remove the check on all selected ARs. Note this function does not select all pages of results. This feature will be implemented in future releases of the panel.

Notes:

- In this panel there is no way to dispose more money than the remaining amount in the AR. For extra dispositions, use the Disposition Summary panel from the AR Maintenance Panel.

- For ARs with disposition history, the only way to dispose more money is by going into the Disposition Summary panel from the AR Maintenance Panel.

- Note all dispositions to a TPL AR also disposition against the Financial cash receipt tables.

- While dispositioning A/Rs a check will be performed to see if the claim has been adjusted. If the claim has been adjusted a warning message will be issued and the user will answer whether or not they wish to continue.

- A/Rs that have no Disposition History are eligible for Auto Deny.

6.19.6 TPL AR Allocation Panel Accessibility

6.19.6.1 To Access the TPL AR Allocation Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	AR Allocation panel displays.

6.20 AR Disposition Summary Panel Overview

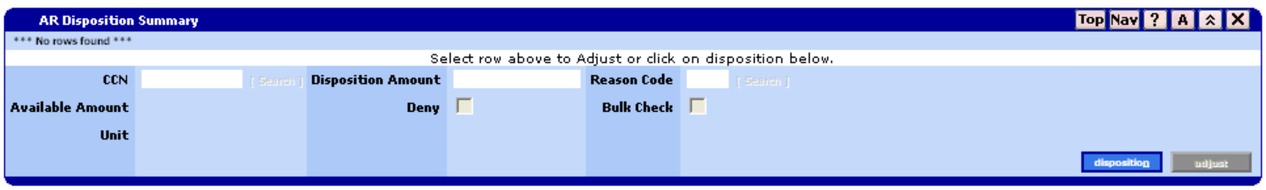
6.20.1 AR Disposition Summary Panel Narrative

The A/R Disposition Summary Panel is used to show all dispositions that have been applied against an accounts receivable. These are credits and debits applied from cash receipts, as well as dispositions for denials and write-offs.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [AR Search] - [(Enter search criteria)] - [(Select a row from Search Results)] - [TPL AR Maintenance] - [A/R Disposition Summary]

6.20.2 AR Disposition Summary Panel Layout



6.20.3 AR Disposition Summary Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Adjust	Opens AR Adjustment panel.	Button	N/A	0
Available Amount	The amount remaining for the CCN.	Field	Number (Decimal)	12
Bulk Check	Check box to indicate if this is a Bulk check that can be used to disposition multiple accounts receivables.	Combo Box	Checkbox	0
CCN [Search]	Check control number.	Hyperlink	N/A	0
Deny	Check box to indicate if this accounts receivable is to be denied.	Combo Box	Checkbox	0
Disposition	Creates a new A/R Disposition Record with details entered on panel.	Button	N/A	0
Disposition Amount	Amount for which the disposition is to apply to the associated A/R.	Field	Number (Decimal)	9
Reason Code [Search]	Reason code for dispositioning this A/R.	Hyperlink	N/A	0
Unit	The unit assigned to the CCN.			

6.20.4 AR Disposition Summary Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Disposition	Button	1	Financial Disposition processing failed.	Financial disposition failed, please verify.
Deny	Check Box	11	Invalid Reason Code for deny.	Change reason code.
Otherwise, Create Expenditure	Check Box	3	Adjustment - Please enter an Add to TplAR or check the Create Expenditure checkbox.	Enter required data or check appropriate checkbox.
CCN	Field	1	Invalid CCN. Please Verify.	Enter a valid CCN or click search and select one from the list.
	Field	2	CCN is in non-sufficient funds status.	Select another CCN.
	Field	3	CCN must be numeric.	CCN must be numeric.
Disposition Amount	Field	1	Disposition amount must be greater than zero.	Enter a disposition amount greater than zero.
	Field	2	Disposition AR amount exceeds AR billed amount.	Enter a lesser disposition amount.
	Field	3	Total disposition amount is greater than the paid amount by $X.XX.	The disposition amount was bigger than the amount remaining in the CCN. Enter an amount same or less than the Amount Available in the CCN.
Reason Code	Field	1	Reason Code for disposition AR must be E, M, R or U.	Enter a vaild Reason Code.
	Field	2	Please enter a valid reason code.	Enter valid reason code.
	Field	3	Adjustment - Reason Code for Adjustment is required.TplAR.	Enter reason code.
Remove this amount	Field	1	Adjustment - Adjustment amount must be greater than zero.	Enter a valid Amount.
	Field	2	Adjustment - Adjustment amount must be less than the original disposition amount.	Amount to remove must be the same or less than the Disposition Amount.

Field	Field Type	Error Code	Error Message	To Correct
Using Reason Code	Field	2	Adjustment - Disposition AR Reason Code is not allowed.	Verify if Reason Code is correct.

6.20.5 AR Disposition Summary Panel Extra Features

The From A/R and To A/R Reason codes have the ability to either be entered, or perform a pop-up search.

If the money is being moved from one AR to another AR, the close date on the AR the money is being moved too, is closed with the current system date.

If the full disposition amount is being adjusted from one AR and being moved to another AR or being created as an expenditure, the close date on the existing AR is reset to zero.

The A/R Number can either be entered or searched from existing TPL A/Rs.

The Create Expenditure check box will transfer the user to the create expenditure panel of the Financial Functional area.

A check is performed to see if the claim for the Add to A/R# has been adjusted. If the claim has been adjusted a warning message will be issued and the user will answer whether or not they wish to continue.

6.20.6 AR Disposition Summary Panel Accessibility

6.20.6.1 To Access the AR Disposition Summary Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL Information and Maintenance panels display.
6	Click AR Disposition Summary hyperlink.	AR Disposition Summary panel displays.

6.20.6.2 To Adjust on the AR Disposition Summary Panel

Step	Action	Response
1	Select row above to adjust.	Data is populated into the fields.
2	Click in desired field to update and perform adjustment.	
3	Click **Save**.	TPL AR Disposition Summary panel is updated.

6.20.6.3 To Disposition on the AR Disposition Summary Panel

Step	Action	Response
1	Click Disposition.	Activates fields for entry of data or selection from lists.
2	Enter **CCN**. Click [Search] if CCN value is unknown.	
3	Enter Budget ID. Click [Search] if Budget ID value is unknown.	
4	Enter Amount Paid.	
5	Select **Deny**, if applicable.	
6	Enter New Reason. Click [Search] if New Reason value is unknown.	
7	Select **Bulk Check**, if applicable.	
8	Click **Save**.	AR Disposition Summary information is saved.

6.21 TPL AR Disp - Adjustment Panel Overview

6.21.1 TPL AR Disp - Adjustment Panel Narrative

The TPL AR Disposition Adjustment Panel is used to adjust an accounts receivable disposition.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [AR Search] - [(Enter search criteria)] - [(Select from Search Results)] - [TPL AR Maintenance] - [AR Disposition Summary] - [Adjust button]

6.21.2 AR Disp - Adjustment Panel Layout

6.21.3 AR Disp - Adjustment Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Amount to Remove	The amount to transfer from the accounts receivable to the accounts receivable entered or expenditure.	Field	Number (Decimal)	9
Create Expenditure	Flag to indicate if the amount to removed from the Selected A/R should be added to another A/R or to create a expenditure.	Listview	Checkbox	1
Disp Amt	Disposition Amount for the selected A/R Disposition.	Field	Number (Decimal)	9
Reason	Reason code for selected accounts receivable disposition.	Field	Character	2
Reason Code for Disposition of FROM A/R	Reason code showing the status of the accounts receivable disposition from where the money is being taken.	Field	Character	2
Reason Code for Disposition of TO A/R	Reason code showing the appropriate status of the accounts receivable disposition where the money is to be applied.	Field	Character	2
Remove amount from Selected A/R and - Add to A/R No	The internal accounts receivable control number to be disposition adjusted. (RRYYDDDBBBSSS) TPL has a region code of 61 and the batch range is 900-950 from the system generated billings	Field	Number (Integer)	13

Field	Description	Field Type	Data Type	Length
	or a batch range of 951-999, if a manual A/R set-up.			
Reason Code for Disposition of FROM A/R [Search]	This allows the user to search for Reason Code for Disposition of FROM A/R.	Hyperlink	N/A	0
Reason Code for Disposition of TO A/R [Search]	Search link allows for a more detailed search for a Reason Code for Disposition of TO A/R.	Hyperlink	N/A	0
Remove amount from Selected A/R and - Add to A/R No [Search]	This allows for a more detailed search for Remove amount from Selected A/R and - Add to A/R No.	Hyperlink	N/A	0

6.21.4 AR Disp - Adjustment Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Amount to Remove	Field	1	Record may not be over applied.	Verify keying. If necessary, review dispositions for the Add to A/R#.
	Field	2	Amount to remove may not be zero.	Verify keying and re-enter dollar amount.
	Field	3	Amount to remove must be greater than zero.	Verify keying and re-enter dollar amount.
	Field	4	Amount to remove cannot be greater than Total Amt Disp.	Review the TPL A/R Dispositions Summary window.
	Field	5	Amount to remove is greater than disposition amount.	Re-enter dollar amount which is less than or equal to the Disp Amt.
	Field	6	Amount to remove must be equal to Disp Amt for Expenditures.	Verify keying and re-enter dollar amount.
Reason Code for Disposition of FROM A/R	Field	1	Reason Code not found.	Reason code must be one of the values listed on the TPL A/R Reason Code Select window.
	Field	2	Reason code 18 may only be used with an expenditure.	Verify keying and choose a different reason code.
	Field	3	Reason code field is required.	Enter a reason code.
	Field	4	Expenditure requires Reason Code 18.	Verify keying and enter reason code 18.

Field	Field Type	Error Code	Error Message	To Correct
Reason Code for Disposition of TO A/R	Field	1	Reason Code not found.	Reason code must be one of the values listed on the TPL A/R Reason Code Select window.
	Field	3	To reason code is not allowed with an expenditure. Please remove data.	Reason code is not valid with Created Expenditure ID.
Remove amount from Selected A/R and - Add to A/R No	Field	1	Record cannot be changed because a daughter claim exists and a new A/R has been created. Apply changes to daughter A/R.	Apply changes to daughter A/R.
	Field	2	Add to A/R not found.	Verify and re-enter correct A/R number that must already exit in A/R table.
	Field	3	Cannot have both Add to A/R# and Expenditure.	Enter either Add to A/R #.
	Field	4	Must have either Add to A/R# or Expenditure.	Enter either Add to A/R #.

6.21.5 AR Disp - Adjustment Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.21.6 AR Disp - Adjustment Panel Accessibility

6.21.6.1 To Access the AR Disp-Adjustment Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Click AR Disposition Summary hyperlink.	AR Disposition Summary panel displays.
6	Click **Adjust**.	TPL AR Disposition Adjustment panel displays.

6.22 TPL AR Letter Panel Overview

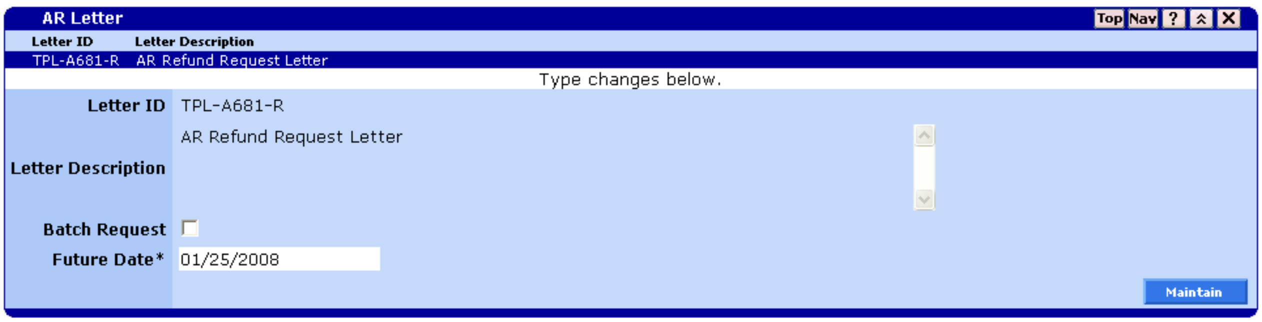
6.22.1 TPL AR Letter Panel Narrative

The TPL AR Letter panel allows the user to request an account receivable letter to send.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [AR Search] - [Search] - [Select a row from search result] - [TPL AR] - [TPL AR Maintenance] - [AR Letter]

6.22.2 TPL AR Letter Panel Layout



6.22.3 TPL AR Letter Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Batch Request	When the checkbox is clicked, the batch is requested.	Combo Box	Checkbox	0
Future Date	The expected date of the letter to be batched.	Field	Date (MM/DD/CCYY)	8
Letter Description	The description of the letter.	Field	Character	4000
Letter ID	This is the identifier of the letter.	Field	Character	10
Maintain	Allows the user the manually print a letter.	Button	N/A	0

6.22.4 TPL AR Letter Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.22.5 TPL AR Letter Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.22.6 TPL AR Letter Panel Accessibility

6.22.6.1 To Access the TPL AR Letter Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL Information and Maintenance panels display.
6	Click **AR Letter** hyperlink.	AR Letter panel displays.

6.22.6.2 To Update the TPL AR Letter Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	AR Letter information is saved.

6.22.6.3 To Maintain the TPL AR Letter Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click Maintain.	Login window displays.
3	Enter User Name and Password.	
4	Click **OK**.	Letter generator opens with a message requesting the user to select: To open the PDF Save the PDF Cancel

6.23 TPL AR Letter History Panel Overview

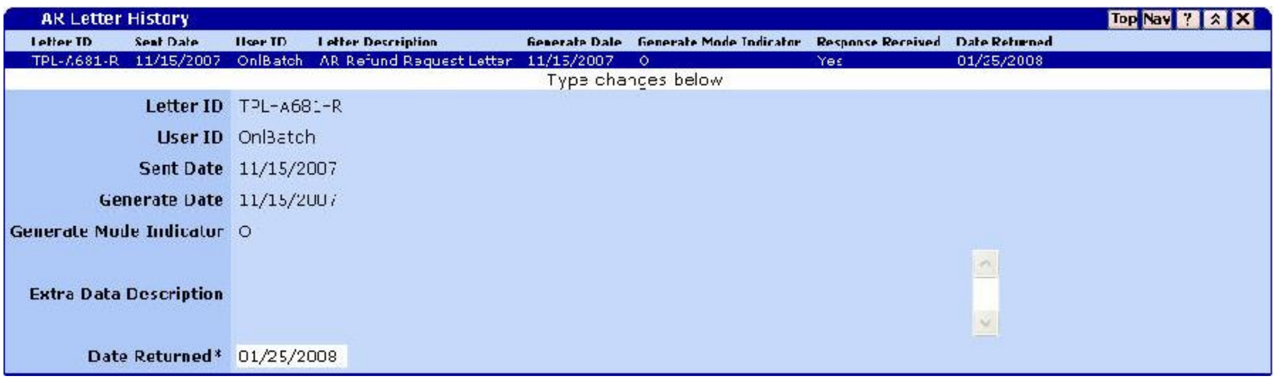
6.23.1 TPL AR Letter History Panel Narrative

The TPL AR Letter History shows all the letters that have been sent out for this accounts receivable.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [AR Search] - [(Enter search Criteria)] - [Search] - [(Select a row from search results)] - [AR Maintenance] - [AR Letter History]

6.23.2 TPL AR Letter History Panel Layout



6.23.3 TPL AR Letter History Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Date Returned	Date the letter was returned.	Field	Date (MM/DD/CCYY)	8
Date Sent	This is the date the letter was created and printed.	Field	Date (MM/DD/CCYY)	8
Extra Data Description	This field contains additional text that was entered when requested by the user.	Field	Character	4000
Generate Date	Date the letter was requested	Field	Date (MM/DD/CCYY)	8
Generate Mode Indicator	The method used to produce the letter (batch or online).	Field	Character	1
Letter Description	The description of the letter.	Field	Character	55
Letter ID	This is the identifier of the letter.	Field	Character	9
Response Received	Yes or No indicator showing whether a response has or has not been received for this letter.	Field	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
Return Code	An indicator used to specify if a response has been received.	Combo Box	Drop Down List Box	0
Sent Date	Date the letter was sent.	Field	Date (MM/DD/CCYY)	8
User ID	The identification number associated with the user that requested the letter.	Field	Character	8

6.23.4 TPL AR Letter History Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Date Returned	Field	1	Return Date should be equal to or greater than 01/01/1900.	Enter Return Date of 01/01/1900 or greater.
	Field	2	Return Date should not be prior to Sent Date or Generate Date.	Enter a valid return date.
	Field	3	Return Date should be less than or equal to 12/31/2299.	Enter Return Date of 12/31/2299 or less.

6.23.5 TPL AR Letter History Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.23.6 TPL AR Letter History Panel Accessibility

6.23.6.1 To Access the TPL AR Letter History Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search.**	AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search.**	Search results display.
5	Select row from search results.	TPL Information and Maintenance panels display.
6	Click **AR Letter History** hyperlink.	AR Letter History panel displays.

6.23.6.2 To Update the TPL AR Letter History Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save.**	AR Letter History panel is updated.

6.24 TPL AR Disp-Base Information Panel Overview

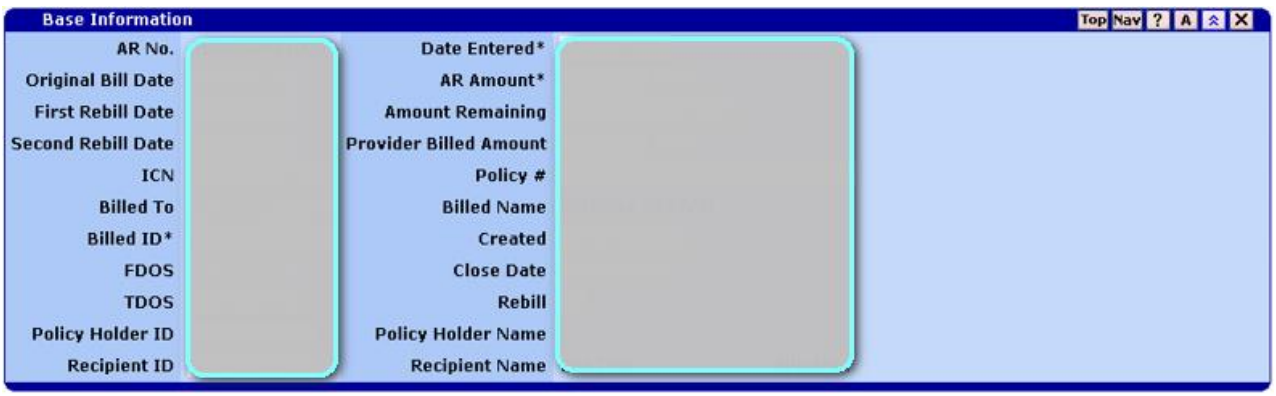
6.24.1 TPL AR Disp-Base Information Panel Narrative

The TPL AR Disp-Base Information panel is used to manually establish an accounts receivable in order to accommodate all outstanding payments from the current MMIS. A/R requires the capability of accepting a manual entry at the recipient, carrier, or policyholder level.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [AR Search] - [(Enter search criteria)] - [Select row from Search Results] - [TPL AR Maintenance] - [Base Information]

6.24.2 TPL AR Disp-Base Information Panel Layout



6.24.3 TPL AR Disp-Base Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
AR No	Accounts receivable control number.	Field	Character	13
AR Amount	Amount billed on this accounts receivable.	Field	Number (Decimal)	12
Amount Remaining	Remaining Amount on accounts receivable.	Field	Number (Decimal)	12
Billed ID	The billing identification number associated with the Billed To. This displays either the Carrier code, Employer identification number, Provider identification number or the Recipient identification number.	Field	Character	12
Billed Name	The name of the third party being billed.	Field	Character	28
Billed To	If this claim was billed to Carrier/Employer/Policyholder/Provider.	Combo Box	Drop Down List Box	0
Close Date	The date the status was changed to a closed status.	Field	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
Created	Creation method. Valid values: Manual or System.	Combo Box	Drop Down List Box	0
Date Entered	The date the account receivable was entered by the user.	Field	Date (MM/DD/CCYY)	8
FDOS	From Date of Service on the claim.	Field	Date (MM/DD/CCYY)	8
First Rebill Date	Date the first rebill was generated.	Field	Date (MM/DD/CCYY)	8
ICN	Claim associated with this accounts receivable.	Field	Character	13
Original Bill Date	Date the accounts receivable was first billed.	Field	Date (MM/DD/CCYY)	8
Policy Holder ID	The system assigned key for the TPL policyholder. This key is used to uniquely identify the policyholder internally to the system and is also used on all screens and reports as Policyholder ID.	Field	Character	9
Policy Holder Name	The last name, first name and middle initial of the policy holder	Field	Character	30
Policy #	The number associated with a policy.	Field	Character	30
Provider Billed Amount	The amount billed by the provider on the claim.	Field	Number (Decimal)	12
Rebill	Rebill indicator that identifies the account receivables that were manually requested by the user using the AR Search Results Panel. This field is protected from this panel.	Field	Character	1
Recipient ID	Unique identification number of the recipient.	Field	Number (Integer)	12
Recipient Name	The last name, first name and middle initial of the recipient.	Field	Character	30
Second Rebill Date	Date the second rebill was generated.	Field	Date (MM/DD/CCYY)	8
TDOS	To Date of Service on the claim.	Field	Date (MM/DD/CCYY)	8

6.24.4 TPL AR Disp-Base Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
AR Amount	Field	1	Amount Billed must be greater than 0.	Enter value greater than 0.
	Field	2	AR Amount is required.	Enter AR Amount.

Field	Field Type	Error Code	Error Message	To Correct
Billed ID	Field	1	Carrier Billed ID is required.	Enter a valid Carrier Billed ID or select one from search list.
	Field	2	Policyholder Billed ID is required.	Enter a valid Policyholder Billed ID or select one from search list
	Field	3	Provider Billed ID is required.	Enter a valid Provider Billed ID or select one from search list.
	Field	4	Recipient Billed ID is required.	Enter a valid Recipient Billed ID or select one from search list.
Date Entered	Field	1	Date Entered is required.	Enter a valid date.
	Field	1	Date Entered must be greater than or equal to 1/ 1/1900.	Enter a valid Date.
FDOS	Field	1	FDOS is missing. A Manual AR requires FDOS, TDOS when no Claim is associated with it.	Please enter the FDOS.
	Field	2	FDOS must be greater than or equal to 01/01/1900.	Enter a valid date.
Original Billed Date	Field	1	Date Entered is required.	Enter a valid date.
Recipient ID	Field	1	If no recipient is assigned to this AR, a TPL Policy must be assigned.	Enter a Recipient ID or a Policy ID.
TDOS	Field	1	Invalid date. Format is MM/DD/CCYY.	Verify keying. The date must be in MM/DD/CCYY or MMDDCCYY format.
	Field	2	TDOS is missing. A Manual AR requires FDOS, TDOS when no Claim is associated with it.	Enter the TDOS.
	Field	3	TDOS must be greater than or equal to 01/01/1900.	Verify date is greater than or equal to 01/01/1900.

6.24.5 TPL AR Disp-Base Information Panel Extra Features

Required fields are AR Amount, Billed To, Billed ID, Created, Date Entered, and First Billed.

The AR Amount must be greater than zero. The Billed amount for an ICN must be greater than 0, and that ICN must be a paid ICN.

Once saved, the AR Base Information cannot be modified from this panel.

The system defaults to 'Manual' when a new AR is about to be created. Additionally, it defaults Date Entered and Original Billed Date to the current system date. If an ICN is associated with an

AR, the system will default the Recipient ID, Provider Billed Amount, From DOS and To DOS based upon that claim.

First Rebill and Second Rebill dates are updated by the Batch System, these are read-only fields.

Close Date will be updated when dispositions are posted to the AR.

Linking Recipient IDs

If the user enters a current ID, the panel determines if the ID entered is active. If not, the panel will save the information under the linked active ID.

If the Recipient subsystem receives a link request and the old sak_recip exists on the t_tpl_ar_health table, the sak_recip is updated in batch to the active sak_recip.

6.24.6 TPL AR Disp-Base Information Panel Accessibility

6.24.6.1 To Access the TPL AR Disp-Base Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL AR Maintenance page displays.
6	Click Base Information.	Base Information panel displays.

6.24.6.2 To Add on the TPLAR Disp-Base Information Panel

Step	Action	Response
1	Enter AR Amount.	
2	Select **Billed To** from the drop down list box.	
3	Enter Billed ID. Click [Search] if Billed ID is unknown.	Billed Name displays.
4	Enter Policyholder ID. Click [Search] if Policyholder ID is unknown.	Policyholder Name displays.
5	Enter Recipient ID. Click [Search] if Recipient ID is unknown.	Recipient Name displays.
6	Enter **Date Entered** in MM/DD/CCYY format. Note: Date is automatically populated with current date.	

Step	Action	Response
7	Enter **ICN**. Click [Search] if ICN is unknown.	
8	Enter **First Billed** in MM/DD/CCYY. Note: Date is automatically populated to current date.	
9	Enter **FDOS** in MM/DD/CCYY format.	
10	Enter **TDOS** in MM/DDCCYY format.	
11	Click **Save**.	Base information is saved.

6.25 TPL AR Disp-Chronological Note Panel Overview

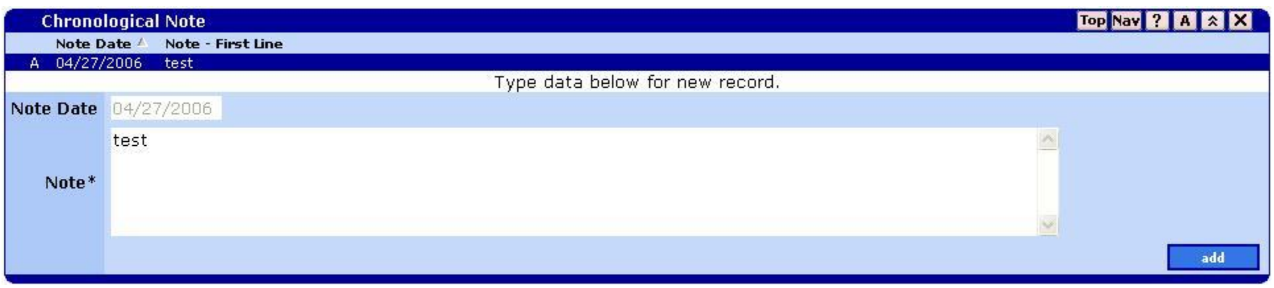
6.25.1 TPL AR Disp- Chronological Note Panel Narrative

The TPL AR Disp Chronological Note panel contains free-form notes entered by the user or batch processes pertaining to a TPL A/R.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation path: [TPL] – [AR Search]-[(Enter search criteria and click on Search)] - [(Select row from Search Results)] - [TPL AR Maintenance] - [AR Health] - [Chronological Note]

6.25.2 TPL AR Disp-Chronological Note Panel Layout



6.25.3 TPL AR Disp-Chronological Note Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the TPL AR Disp-Chronological Note panel.	Button	N/A	0
Note	Text field used to enter note information.	Field	Character	500
Note Date	Date the chronological note was added.	Field	Date (MM/DD/CCYY)	8
Note - First Line	Label of Note - First Line.	Label	N/A	50

6.25.4 TPL AR Disp-Chronological Note Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Note	Field	1	Note is required.	Verify keying. Enter note in the note field.
	Field	2	You have exceeded the maximum number of characters allowed for this field. Your text has been truncated to the maximum 500 characters.	Verify keying. Note entered cannot exceed 500 characters.

6.25.5 TPL AR Disp-Chronological Note Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.25.6 TPL AR Disp-Chronological Note Panel Accessibility

6.25.6.1 To Access the TPL AR Disp-Chronological Note Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search.**	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search.**	Search results display.
5	Select row from search results.	TPL AR Maintenance panel displays.
6	Click Chronological Note hyperlink.	Chronological Note panel displays.

6.25.6.2 To Add on the TPL AR Disp-Chronological Note Panel

Step	Action	Response
1	Click **Add.**	Activates fields for entry of data or selection from lists.
2	Enter **Note** information in free form text field.	Note Date automatically displays current date.
3	Click **Save.**	Chronological Note information is saved.

6.26 Case Tracking Search Panel Overview

6.26.1 Case Tracking Search Panel Narrative

The State will use the Case Tracking Search panel to determine if a lead has previously been received on a specific case. Available search criteria are: Recipient ID; Recipient Last Name with Recipient First Name; Recipient Last Name with any other field; Case Number; Case Type; User ID; and Recipient Birth Date with at least one other field. Except for Recipient First Name which can only be used in conjunction with Recipient Last Name, all other search fields can be used together in any combination. If a case is found on the system matching the search criteria entered, the information pertaining to that case is displayed.

This panel is inquiry only.

Navigation Path: [TPL] - [Case Tracking Search]

6.26.2 Case Tracking Search Panel Layout

6.26.3 Case Tracking Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Case Tracking Search panel.	Button	N/A	0
Case Type	This indicates the type of the casualty case.	Combo Box	Drop Down List Box	0
Clear	Clears the fields in the search panel.	Button	N/A	0
Current ID [Search]	Member's identification number.	Hyperlink	N/A	0
Ext Entity Case Number	Casualty Case number provided by external entity.	Field	Number(Integer)	9
DXC Case Number[Search]	System assigned case number.	Hyperlink	N/A	0
Recipient DOB	Recipient's date of birth.	Field	Date (MM/DD/CCYY)	10
Recipient First Name	Recipient's first name.	Field	Character	13
Recipient Last Name	Recipient's last name.	Field	Character	15
Recipient SSN	Recipient's Social Security number.	Field	Number (Integer)	9

Field	Description	Field Type	Data Type	Length
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Searches for records based on search criteria.	Button	N/A	0
User ID	The user ID of the examiner assigned to the case.	Field	Character	8

6.26.4 Case Tracking Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Ext Entity Case Number	Field	1	Ext Entity Case Number must be numeric.	Please enter at least one search field.
Search	Button	1	Please enter at least one search field.	Please enter at least one search field.
Recipient DOB	Field	100	Invalid date. Format is MM/DD/CCYY.	Recipient Date of Birth is invalid.
Recipient First Name	Field	1	Last Name required when Recipient First Name entered.	Recipient Last Name is required when Recipient's First name is captured.
	Field	991	Invalid character in field.	Recipient's First Name Contains invalid Characters.
Recipient Last Name	Field	991	Invalid Characters in field.	Recipient's Last Name Contains invalid Characters.
Recipient SSN	Field	1	Enter a valid value.	SSN must be 9 numeric.
User ID	Field	991	Invalid character in field.	User ID contains Invalid Character.

6.26.5 Case Tracking Search Panel Extra Features

Linking Recipient IDs

If the user enters a current ID, the panel determines if the ID entered is active. If not, the panel will retrieve and display the records based on the active ID.

6.26.6 Case Tracking Search Panel Accessibility

6.26.6.1 To Access the Case Tracking Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL Case Tracking panel displays.

6.27 Case Tracking Search Results Panel Overview

6.27.1 Case Tracking Search Results Panel Narrative

The Case Tracking Search results panel shows case information selected from the Case Tracking Search Panel. It is used to determine if a lead has previously been received on a specific case.

This panel is display only.

Navigation Path: [TPL] – [Case Tracking Search] - (Enter search criteria and click [Search] button)

6.27.2 Case Tracking Search Results Panel Layout

6.27.3 Case Tracking Search Results Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Accident Date	This field identifies the date that the accident or injury occurred. Used to identify claims that could be used in this case.	Label	Date (MM/DD/CCYY)	8
Case Number	The unique identifier for a casualty case. Used by account to identify the casualty cases on reports.	Label	Number (Integer)	9
Case Status	This represents the current status of the casualty case.	Label	Character	25
Case Type	This indicates the type of the casualty case.	Label	Character	25
Cur ID	The recipient's Medicare ID.	Label	Character	12
Ext Entity Case Number	Casualty Case number provided by external entity.	Label	Number(Integer)	9
Recipient DOB	The date of birth of the recipient.	Label	Date (MM/DD/CCYY)	8
Recipient Name	Recipient's last (15 characters), first name (13 characters) and middle initial (1 character).	Label	Character	31
Recipient SSN	The social security number of the recipient.	Label	Number (Integer)	9

Field	Description	Field Type	Data Type	Length
User ID	The clerk ID of the examiner assigned to the case.	Label	Character	8

6.27.4 Case Tracking Search Results Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.27.5 Case Tracking Search Results Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.27.6 Case Tracking Search Results Panel Accessibility

6.27.6.1 To Access the Case Tracking Search Results Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL Case Tracking panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.

6.28 Case Tracking Mini Search Panel Overview

6.28.1 Case Tracking Mini Search Panel Narrative

The Case Tracking Mini Search panel allows the user to quickly change from one casualty case to another without performing a new search from the main menu system.

This panel is inquiry only.

Navigation Path: [TPL] – [Case Tracking] - [(Enter search criteria and click on [Search]) - [(Select from Search Results)] - [Case Tracking Information] - [Mini Search]

6.28.2 Case Tracking Mini Search Panel Layout

6.28.3 Case Tracking Mini Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Case Number	The unique identifier for a casualty case. Used by account to identify the casualty cases on reports.	Field	Number (Integer)	9
Clear	Clears out the case number field.	Button	N/A	0
Search	Searches by the entered case number.	Button	N/A	0

6.28.4 Case Tracking Mini Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Search	Button	1	Please enter at least one search field.	Enter a case number and then click search.
Case Number	Field	1	Input string was not in a correct format.	The case number is a numeric only field.

6.28.5 Case Tracking Mini Search Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.28.6 Case Tracking Mini Search Panel Accessibility

6.28.6.1 To Access the Case Tracking Mini Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.

Step	Action	Response
2	Point to **TPL** and click **Case Tracking**.	TPL Case Tracking panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Mini Search panel displays at the top of page.

6.28.6.2 To Navigate the Case Tracking Mini-Search Panel

Step	Action	Response
1	Enter Case Number.	
2	Click **Search**.	Case Tracking Information and Maintenance panels display.

6.29 Case Tracking Information Panel Overview

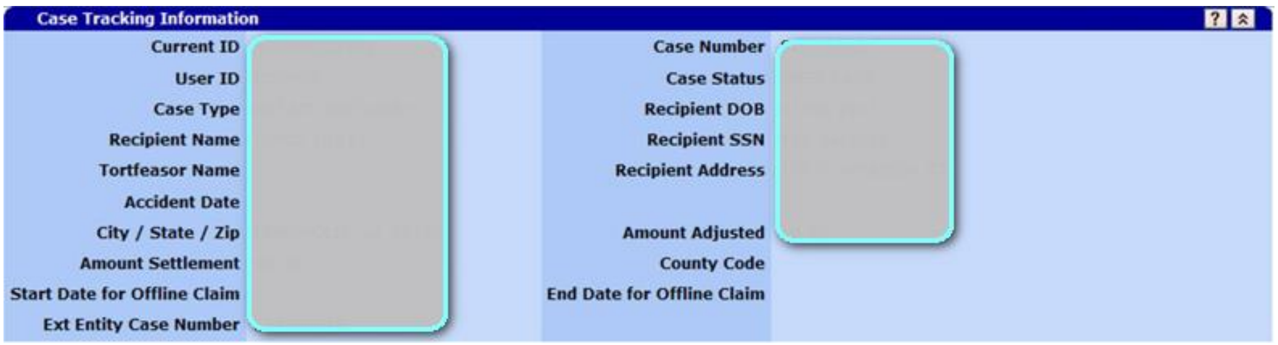
6.29.1 Case Tracking Information Panel Narrative

The Case Tracking Information panel is used to view information about a casualty case.

This panel is display only.

Navigation Path: [TPL] - [Case Tracking Search] - [Search] - [Select row from search results]

6.29.2 Case Tracking Information Panel Layout



6.29.3 Case Tracking Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Accident Date	This field identifies the date that the accident or injury occurred. Used to identify claims that could be used in this case.	Field	Date (MM/DD/CCYY)	8
Amount Adjusted	The amount removed from the case since it is not actually part of the case.	Field	Number (Decimal)	9
Amount Settlement	The amount the case was settled for.	Field	Number (Decimal)	9
Case Number	The unique identifier for a casualty case. Used by account to identify the casualty cases on reports.	Field	Number (Integer)	9

Field	Description	Field Type	Data Type	Length
Case Status	This field is used to identify the current status of the case. Valid values include: A = Recovered MAX-The total case amount was collected and dispositioned. This is a closed case. B = In Compromise- The responsible party is negotiating a lower settlement amount. This is an open case. F = Closed Full Amount- The full settlement amount has been received and dispositioned. This is a closed case. I = Intake-A lead has been received for potential recovery and the case has been added, but further research is needed for pursuing recoveries. This is an open case. L = Lead Review-The case has been transferred to a supervisor or designee for review. This is an open case. M = Closed Partial Recovery-The total case amount was not collected, but a partial recovery was received and dispositioned. This is a closed case. N = No Further Pursuit-After further research, it was determined the case should not be pursued. This is a closed case. O = Open Case-All research has been completed and the case should be pursued. This is an open case. X = Closed No Recovery- The case was pursued, but no money is recoverable. This is a closed case. B = REF TPL Investigator-The case has been referred to a TPL Investigator for further analysis. This is an open case.	Field	Character	1
Case Type	This indicates the type of the casualty case.	Field	Character	1
City	The city where the recipient resides.	Field	Character	18
County Code	The county code used to identify a geographical/political area in the state.	Field	Character	10
Current ID	Unique identifier for the recipient.	Field	Character	12
End Date for Offline Claim	Claim date and time when service ended.	Field	Date (MM/DD/CCYY-HH:MM:SS)	8
Ext Entity Case Number	Casualty Case number provided by external entity.	Field	Number(Integer)	9

Field	Description	Field Type	Data Type	Length
Recipient Address	The first line of the recipient's street address.	Field	Character	30
Recipient DOB	The date of birth for the recipient.	Field	Date (MM/DD/CCYY)	8
Recipient Name [First]	The first name of a recipient.	Field	Character	15
Recipient Name [Last]	The last name of the recipient.	Field	Character	20
Recipient SSN	The Social Security Number for a recipient.	Field	Number (Integer)	9
Start Date for Offline Claim	Claim Date and time when service started.	Field	Date (MM/DD/CCYY)	8
State	The state where the recipient resides.	Field	Character	2
Tortfeasor Name [First]	The first name of the tortfeasor used to address the correspondence, cover letters, and liens.	Field	Character	13
Tortfeasor Name [Last]	The last name of the Tortfeasor used to address the correspondence, cover letters, and liens.	Field	Character	15
User ID	The clerk identification number of the examiner assigned to the case.	Field	Character	8
Zip	The five character zip code for the recipient.	Field	Number (Integer)	5

6.29.4 Case Tracking Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.29.5 Case Tracking Information Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.29.6 Case Tracking Information Panel Accessibility

6.29.6.1 To Access the Case Tracking Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL Case Tracking panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Information panel displays.

6.30 Case Tracking Maintenance Panel Overview

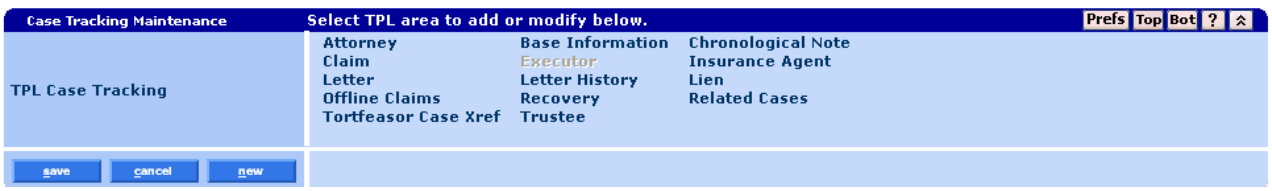
6.30.1 Case Tracking Maintenance Panel Narrative

The Case Tracking Maintenance panel contains links to open various panels for casualty case tracking maintenance.

This panel is inquiry only.

Navigation Path: [TPL] – [Case Tracking Search] - [(enter search criteria and click on Search)] - [(select row from search results)]

6.30.2 Case Tracking Maintenance Panel Layout



6.30.3 Case Tracking Maintenance Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Attorney	Link to the Case Tracking Attorney panel.	Hyperlink	N/A	0
Base Information	Link to the Case Tracking Base Information panel.	Hyperlink	N/A	0
Cancel	Cancels the current changes.	Button	N/A	0
Chronological Note	Link to the Case Chronological Note panel.	Hyperlink	N/A	0
Claim	Link to the Case Tracking Claim panel.	Hyperlink	N/A	0
Insurance Agent	Link to the Case Tracking Insurance Agent panel.	Hyperlink	N/A	0
Letter	Link to the Case Tracking Letter panel.	Hyperlink	N/A	0
Letter History	Link to the Case Tracking Letter History panel.	Hyperlink	N/A	0
Lien	Link to the Case Tracking Lien panel.	Hyperlink	N/A	0
New	Allows the user to add new Case Tracking information.	Button	N/A	0
Offline Claims	Link to the Case Tracking Offline Claims panel.	Hyperlink	N/A	0

Field	Description	Field Type	Data Type	Length
Recovery	Link to the Case Tracking Recovery panel.	Hyperlink	N/A	0
Related Cases	Link to the Case Tracking Related Cases panel.	Hyperlink	N/A	0
Save	Saves the current record.	Button	N/A	0
Tortfeasor Case Xref	Link to the Tortfeasor Case Xref panel.	Hyperlink	N/A	0
Trustee	Link to Case Tracking Trustee panel.	Hyperlink	N/A	0

6.30.4 Case Tracking Maintenance Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.30.5 Case Tracking Maintenance Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.30.6 Case Tracking Maintenance Panel Accessibility

6.30.6.1 To Access the Case Tracking Maintenance Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL Case Tracking panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Maintenance panel displays.

6.30.6.2 To Navigate the Case Tracking Maintenance Panel

Step	Action	Response
1	Select **TPL** area to add or modify.	Select panel displays.

6.31 Case Tracking Attorney Panel Overview

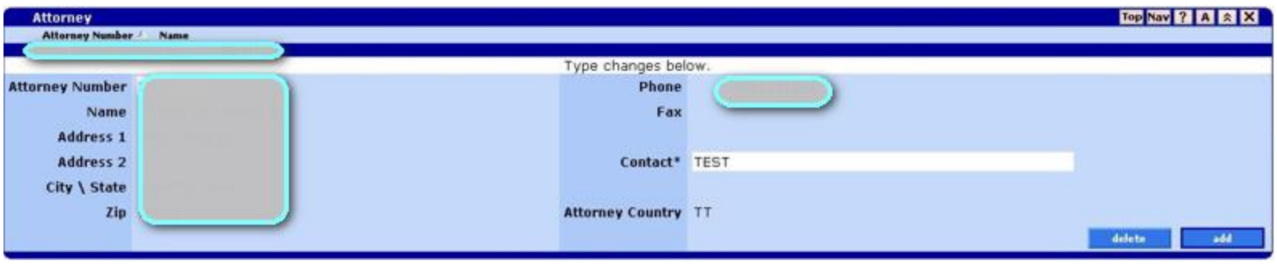
6.31.1 Case Tracking Attorney Panel Narrative

The Case Tracking Attorney panel is used to add or delete attorney information of the accident/injury case.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Case Tracking Search] - [Enter Search Criteria - Click Search] - [Select Row From Search Results] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Attorney]

6.31.2 Case Tracking Attorney Panel Layout



6.31.3 Case Tracking Attorney Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Case Tracking Attorney panel.	Button	N/A	0
Address 1	Address of the attorney.	Field	Character	30
Address 2	Address 2 of the attorney.	Field	Character	30
Attorney Country	Country of the attorney.	Field	Character	2
Attorney Number	Unique system assigned number for each attorney.	Field	Number (Integer)	8
City \ State	Attorney city and state.	Field	Character	20
Contact	Attorney contact person name.	Field	Character	40
Delete	Deletes the record.	Button	N/A	0
Fax	Fax machine number of the attorney.	Field	Number (Integer)	10
Name	Recipient's attorney's last name, first name and middle initial.	Field	Character	29
Phone	Phone number of the attorney.	Field	Number (Integer)	10

Field	Description	Field Type	Data Type	Length
Zip	The first 5 digits and the last 4 digits of the zip code for the attorney.	Field	Number (Integer)	9

6.31.4 Case Tracking Attorney Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Attorney Number	Field	1	A valid Attorney Number is required.	Enter or select a valid Attorney Number.
	Field	2	This Attorney is already in the list.	Enter or select a different Attorney Number.
Contact	Field	1	Contact is required.	Enter a contact name.

6.31.5 Case Tracking Attorney Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.31.6 Case Tracking Attorney Panel Accessibility

6.31.6.1 To Access the Case Tracking Attorney Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL Case Tracking panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Information and Maintenance panels display.
6	Click **Attorney** hyperlink.	Case Tracking Attorney panel displays.

6.31.6.2 To Add on the Case Tracking Attorney Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Attorney Number. If unknown, click [Search] to locate by a combination of last name, first name, country, and email. Users may also select from the list of results displayed at bottom of panel.	Name, Address 1, Address 2 (if applicable), City/State, Zip, phone and fax information populates.
3	Enter **Contact**.	
4	Click **Save**.	Case Tracking Attorney information is saved.

6.31.6.3 To Update the Case Tracking Attorney Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Case Tracking Attorney information is saved.

6.31.6.4 To Delete the Case Tracking Attorney Panel

Step	Action	Response
1	Click line item to be deleted	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.32 Case Tracking Base Information Panel Overview

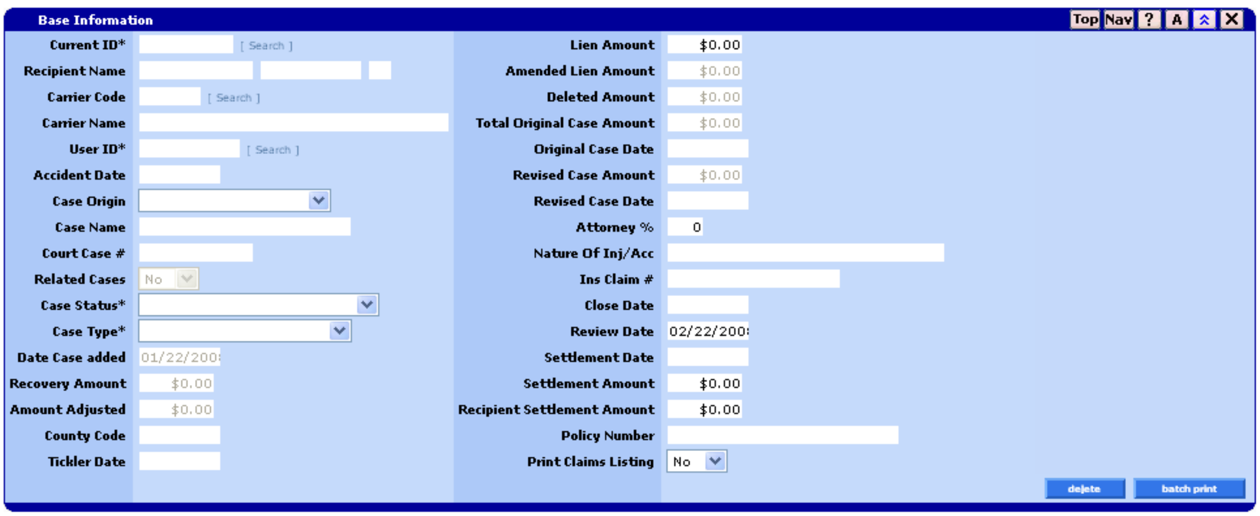
6.32.1 Case Tracking Base Information Panel Narrative

The Agency uses the Case Tracking Base Information panel to record fundamental information about a specific case.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Case Tracking Search] - [Enter Search Criteria and Click on Search] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Case Tracking Base Information]

6.32.2 Case Tracking Base Information Panel Layout



6.32.3 Case Tracking Base Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Accident Date	This field identifies the date that the accident occurred. Used to identify claims that could be used in this case.	Field	Date (MM/DD/CCYY)	8
Amended Lien Amount	Specifies the amended lien amount of the case.	Field	Number (Decimal)	12
Amount Adjusted	This is the amount removed from the case since it is not actually part of the case.	Field	Number (Decimal)	9
Attorney %	Specifies the attorney percentage fee.	Field	Character	6
Batch Print	This adds the sak_casualty to table T_TPL_RQST_REPORT.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
Carrier Code	Specifies the insurance company carrier code associated with case.	Field	Alphanumeric	5
Carrier Name	Name of the Carrier business.	Field	Alphanumeric	45
Case Name	Specifies the court case name to be printed on the requested attorney letter. This information is not stored on the case record.	Field	Alphanumeric	20
Case Number	The unique identifier for a casualty case. Used by account to identify the casualty cases on reports.	Field	Number (Integer)	9
Case Origin	This field identifies the party who sent the intake notification originally.	Combo Box	Drop Down List Box	0

Field	Description	Field Type	Data Type	Length
Case Status	This field is used to identify the current status of the case. Valid values include: A = Recovered MAX-The total case amount was collected and dispositioned. This is a closed case. B = In Compromise-The responsible party is negotiating a lower settlement amount. This is an open case. F = Closed Full Amount-The full settlement amount has been received and dispositioned. This is a closed case. I = Intake-A lead has been received for potential recovery and the case has been added, but further research is needed for pursuing recoveries. This is an open case. L = Lead Review-The case has been transferred to a supervisor or designee for review. This is an open case. M = Closed Partial Recovery-The total case amount was not collected, but a partial recovery was received and dispositioned. This is a closed case. N = No Further Pursuit-After further research, it was determined the case should not be pursued. This is a closed case. O = Open Case-All research has been completed and the case should be pursued. This is an open case. X = Closed No Recovery-The case was pursued, but no money is recoverable. This is a closed case. B = REF TPL Investigator-The case has been referred to a TPL Investigator for further analysis. This is an open case.	Combo Box	Drop Down List Box	0
Case Type	Type of casualty case.	Combo Box	Drop Down List Box	0
Court Case #	The legacy court case number associated with the case name.	Field	Character	12
Current ID	Recipient’s identification number.	Field	Number (Integer)	12
Date Case Added	The date the case was added to the case tracking (casualty case table).	Field	Date (MM/DD/CCYY)	8
Delete	Deletes the current record.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
Deleted Amount	Specifies the amount of the case that was entered.	Field	Number (Decimal)	12
Ins. Claim #	The claim number assigned by the insurance company.	Field	Character	16
Lien Amount	Specifies the amount of the lien.	Field	Number (Decimal)	12
Nature of Inj / Acc	Type of injury the recipient sustained. Free form description of the injury in a casualty case.	Field	Character	30
Original Case Date	The date the case was first billed.	Field	Date (MM/DD/CCYY)	8
Policy Number	The number associated with a policy.	Field	Character	30
Previous Review Date	This is the most recent date that this case was reviewed.	Field	Date (MM/DD/CCYY)	8
Print Claims Listing	Allows user to print a hard copy of the TPL Trauma Detail Claims Listing Report.	Combo Box	Drop Down List Box	0
Recipient Settlement Amount	Specifies the recipient settlement amount of the case.	Field	Number (Decimal)	9
Recipient Name	The Recipient's Last (15 characters) and First Name (13 characters) and Middle Initial (1 character).	Field	Character	29
Recovery Amount	The casualty case recovery amount populated from the Settlement panel.	Field	Number (Decimal)	12
Related Cases	Indicates whether there is another recipient (case) related to this case.	Combo Box	Check Box	0
Review Date	The next date the case is reviewed or the date of case closure. The last action/update date of a casualty case.	Field	Date (MM/DD/CCYY)	8
Revised Case Amount	Specifies the total claim paid amount of all claims selected for the case after it has been originally billed. This field is system populated and updated to reflect the total claim paid amount of all claims on the case if the original bill date is populated.	Field	Number (Decimal)	12
Revised Case Date	Specifies the revised date the case was billed on.	Field	Date (MM/DD/CCYY)	8
Settlement Amount	This is the amount settled in a case.	Field	Number (Decimal)	9

Field	Description	Field Type	Data Type	Length
Settlement Date	Specifies the settlement date of the case.	Field	Date (MM/DD/CCYY)	8
Tickler Date	The tickler date specifies the date of when the next action should be taken on the case.	Field	Date (MM/DD/CCYY)	8
Total Original Case Amount	Specifies the total claim paid amount of all claims selected for the case before it is originally billed. This field is system populated and updated to reflect the total claim paid amount of all claims on the case as long as the case has not been billed yet.	Field	Number (Decimal)	12
User ID	The clerk identification of the examiner assigned to the case.	Field	Character	8

6.32.4 Case Tracking Base Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Accident Date	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter the Accident Date in the correct format.
	Field	2	Accident Date must be greater than or equal to 01/01/1900.	Enter a date greater than 01/01/1900.
	Field	3	Accident Date must be earlier or equal than Date Case added.	Enter a date earlier or equal than the Date Case added.
	Field	4	Accident Date MM/DD/CCYY must be less than or equal to Review Date MM/DD/CCYY.	Enter an Accident Date earlier than the Review date.
Batch Print	Button	1	Report TPL-0029-R already requested for next batch cycle.	Nothing, this is an informational message.
	Button	2	Report TPL-0029-R added to next batch cycle.	Nothing, this is an informational message.
Carrier Code	Field	1	Carrier code required when dispositioning a check.	Please enter a valid carrier code or use the search option.
	Field	2	Carrier is not valid or inactive.	Enter an active valid carrier number.

Field	Field Type	Error Code	Error Message	To Correct
Case Status	Field	1	A valid Case Status is required.	Select a Case Status from the drop down.
	Field	2	Case Status not valid – Deleted amount should be zero.	When Closed - Full Amount status is selected. Deleted amount must be zero.
	Field	3	Case status not valid – No recoveries have been posted.	When Closed - Full Amount, Closed - Partial Recovery, and Recovered Max are selected, there must be at least one Recovery.
	Field	4	Case status not valid – Partial recovery has not been posted.	When Closed - Partial Recovery is selected, there must be at least one recovery.
	Field	5	This Case must have claims associated to it, in order to have this status.	When Closed - Full Amount, Closed - Partial Recovery, and Recovered Max are selected, there must be at least one Claim associated with this case.
	Field	7	Case status not valid - Deleted amount should be zero.	When other closed status other than Closed - Full Amount is selected. The deleted amount cannot be zero.
Case Type	Field	91037	A valid Case Type is required.	Select a value for Case Type.
Current ID	Field	1	A valid Base is required.	Enter or select a Current ID.
Lien Release Date	Field	2	Lien Released Date must be greater than or equal to 01/01/1900.	Enter a Lien Released Date greater than 01/01/1900.
	Field	91001	Invalid date.	Enter a valid date (MM/DD/CCYY).
Lien Sent Date	Field	2	Lien Org Date must be greater than or equal to 01/01/1900.	Enter a Lien Sent Date greater than 01/01/1900.
	Field	91001	Invalid date. Format is MM/DD/CCYY.	Enter a valid date (MM/DD/CCYY).
Print Claims Listing	Field	1	Report TPL-A052-R already requested for next batch cycle.	Nothing, this is an informational message.
	Field	2	Report TPL-A052-R cannot be requested - No claims found.	Nothing, this is an informational message.

Field	Field Type	Error Code	Error Message	To Correct
	Field	3	Claims listing report TPL-A052-R successfully requested.	Nothing, this is an informational message.
Review Date	Field	1	Review Date must be a future date.	Review Date must be greater than original case date.
Settlement Date	Field	1	Settlement Date must be equal or later than the Accident Date.	Enter a date equal or later than the accident date.
Total Original Case Amount	Field	1	Dispositioned Amount Exceeds Case Total.	Nothing, this is only an informational message.
User ID	Field	1	User ID is required.	Enter a User ID.
	Field	2	Invalid User ID. User ID is not listed in the Security Table.	Enter a valid value.

6.32.5 Case Tracking Base Information Panel Extra Features

Linking Recipient IDs

If the user enters a current ID, the panel determines if the ID entered is active. If not, the panel will save the information under the linked active ID.

If the Recipient subsystem receives a link request and the old sak_recip exists on the t_casualty_case table, the sak_recip is updated in batch to the active sak_recip.

Case Tracking Activity

If the user adds a new case or updates the status on an existing case, the panel inserts the old status and new status into the t_cas_case_act table. This data is used for the TPL-0003-M and TPL-0004-M reports.

6.32.6 Case Tracking Base Information Panel Accessibility

6.32.6.1 To Access the Case Tracking Base Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL Case Tracking panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Information and Maintenance panels display.
6	Click **Base Information** hyperlink.	Case Tracking Base Information panel displays.

6.32.6.2 To Add on the Case Tracking Base Information Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Current ID.	Recipient's last name, first name and middle initial automatically populate when the Current ID is entered.
3	Enter Carrier Code.	
4	Enter **User ID**.	
5	Enter **Accident Date** in MM/DD/CCYY format.	
6	Select **Case Origin** from drop down list.	
7	Enter Case Name.	
8	Enter Court Case #.	
9	Enter Ins. Claim #.	
10	Select checkbox, if applicable, if there are **Related Cases**.	
11	Select **Case Status** from drop down list.	
12	Select **Case Type** from drop down list.	
13	Enter Amount Adjusted.	
14	Enter **Tickler Date** in MM/DD/CCYY format.	
15	Enter Lien Amount.	
16	Enter Amended Lien Amount.	
17	Enter **Original Case Date** in MM/DD/CCYY format.	

Step	Action	Response
18	Enter **Revised Case Date** in MM/DD/CCYY format.	
19	Enter Attorney %.	
20	Enter Nature of Inj/Acc.	
21	Enter **Review/Closed Date** in MM/DD/CCYY format.	
22	Enter **Settlement Date** in MM/DD/CCYY format.	
23	Enter Settlement Amount.	
24	Enter Recipient Settlement Amount.	
25	Enter Policy Number.	
26	Select **Print Claims Listing** from drop down list.	
27	Click **Save**.	Case Tracking Base Information is saved.

6.33 Case Tracking Chronological Note Panel Overview

6.33.1 Case Tracking Chronological Note Panel Narrative

The Agency uses the Case Tracking Chronological Note panel to write information concerning the case (i.e. phone calls, updates, etc.).

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Case Tracking Search] - [(Enter Search Criteria and Click on Search)] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Chronological Note]

6.33.2 Case Tracking Chronological Note Panel Layout

6.33.3 Case Tracking Chronological Note Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Caes Tracking Chronological Note panel.	Button	N/A	0
Note	This is used for free form text in the chronological notes.	Field	Character	500
Note - First Line	First line of the note that was keyed. Click Save to display the first line of the notes.	Label	Character	50
Note Date	This identifies the date a particular chronological note was added to the case.	Label	Date (MM/DD/CCYY)	8

6.33.4 Case Tracking Chronological Note Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Note	Field	1	Note is required.	Enter at least one line of a note.

6.33.5 Case Tracking Chronological Note Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.33.6 Case Tracking Chronological Note Panel Accessibility

6.33.6.1 To Access the Case Tracking Chronological Note Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL Case Tracking panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Information and Maintenance panels display.
6	Click Chronological Note hyperlink.	Case Tracking Chronological Note panel displays.

6.33.6.2 To Add on the Case Tracking Chronological Note Panel

Step	Action	Response
1	Click **Add**. Note Date defaults to current date.	Activates fields for entry of data or selection from lists.
2	Enter **Note** in free form text field.	Note Date automatically displays as current date.
3	Click **Save**.	Chronological Note information is saved.

6.33.6.3 To Update the Case Tracking Chronological Note Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Chronological Note Information is saved.

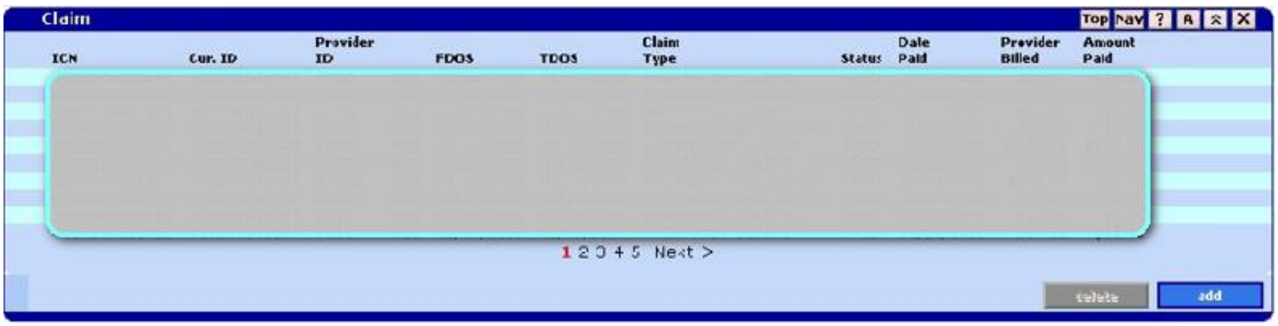
6.34 Case Tracking Claim Panel Overview

6.34.1 Case Tracking Claim Panel Narrative

The Case Tracking Claim panel provides general information about the claims associated to a case and allows the user to search for a claim in the system to associate the claim to a case.

Navigation Path: [TPL] - [Case Tracking] - [Enter Search Criteria] – [Click Search] - [Select Row From Search Results] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Claim]

6.34.2 Case Tracking Claim Panel Layout



6.34.3 Case Tracking Claim Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Case Tracking Claim panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Amount Paid	Amount paid on the claim.	Field	Number (Decimal)	12
Provider Billed	The amount billed by the provider.	Field	Number (Decimal)	12
Provider ID Type	The type of the Provider displayed: National Provider Identifier (NPI) or Medicaid (MCD).	Field	Character	3
Claim Type	The type of claim billed to Medicaid. Identifies the type of claim like outpatient, inpatient, dental, etc.	Label	Character	50
Current ID	Unique identifier for the recipient.	Label	Character	12
Date Paid	The date on which the claim was paid.	Label	Date (MM/DD/CCYY)	8
FDOS	Date on which service was first provided (oldest date of all details).	Label	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
ICN	Number assigned to a claim processed in the system. This is used for control purposes.	Label	Number (Integer)	13
Provider ID	Unique identifier for the provider	Label	Character	15
Status	Description of claim status.	Label	Character	20
TDOS	Last date on which service was provided to a recipient (most recent date of all details).	Label	Date (MM/DD/CCYY)	8

6.34.4 Case Tracking Claim Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.34.5 Case Tracking Claim Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.34.6 Case Tracking Claim Panel Accessibility

6.34.6.1 To Access the Case Tracking Claim Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to TPL and click Case Tracking Search.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL Case Tracking Information and Maintenance panels display.
6	Click **Claim** hyperlink.	Case Tracking Claim panel displays.

6.35 Case Tracking Claims Search Panel Overview

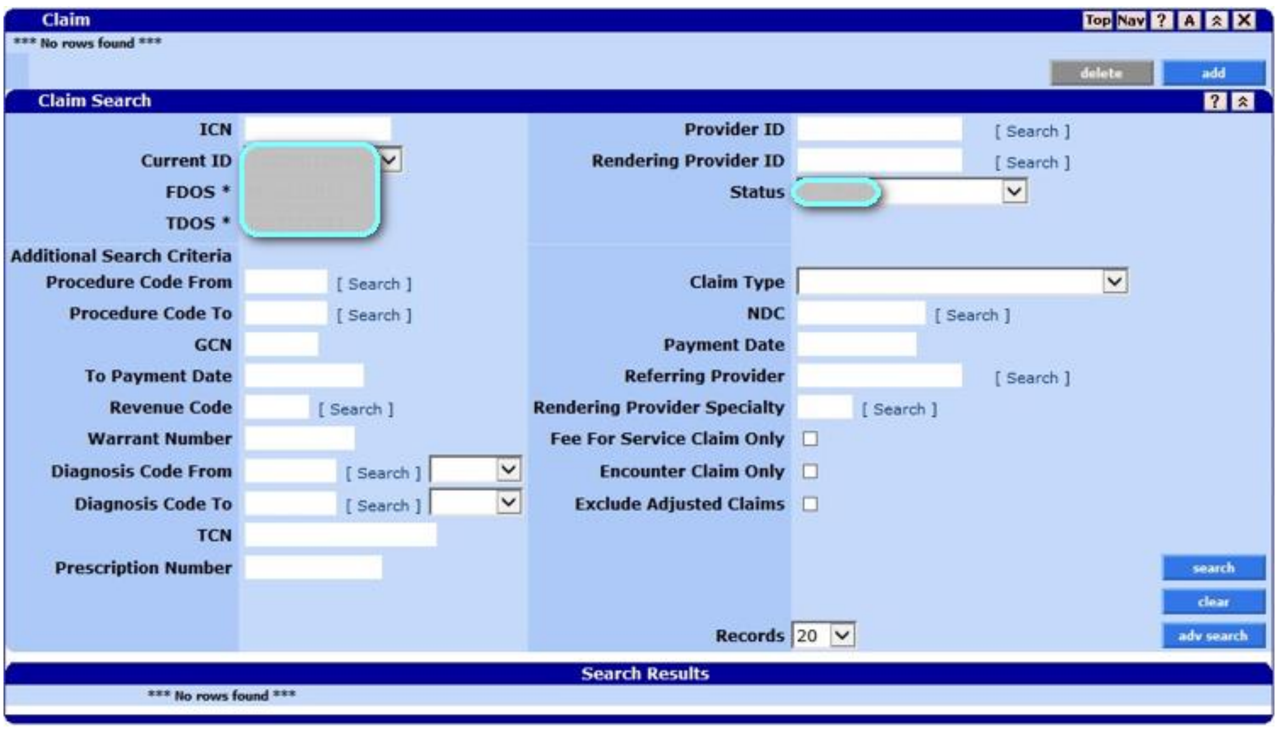
6.35.1 Case Tracking Claims Search Panel Narrative

The Agency uses the Case Tracking Claims Search panel to inquire on the itemized list of claims related to a specific case.

This panel is inquiry only.

Navigation Path: [TPL] – [Case Tracking Search] - [(enter search criteria and click on Search)] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Claim] - [Add]

6.35.2 Case Tracking Claims Search Panel Layout



6.35.3 Case Tracking Claims Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Advanced Search	Toggles between a regular search and an advanced search.	Button	N/A	0
Claim Type	The type of claim billed to Medicaid. Identifies the type of claim like outpatient, inpatient, dental, etc.	Combo Box	Drop Down List Box	0
Clear	Clears the search criteria.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
Current ID	Recipient's identification number.	Combo Box	Drop Down List Box	12
Diagnosis Code From [Search]	A code for the condition requiring medical attention. This field is used in a range search with Diagnosis TO.	Hyperlink	N/A	0
Diagnosis Code To [Search]	A code for the condition requiring medical attention. This field is used in a range search with Diagnosis FROM.	Hyperlink	N/A	0
Encounter Claim Only	Returns only Encounter Claims.	Combo Box	Check Box	0
Exclude Adjusted Claims	Excludes Adjusted Claims.	Combo Box	Check Box	0
FDOS	From date of service. The first date of service that the claim was submitted for.	Field	Date (MM/DD/CCYY)	8
Fee for Service Claim Only	Returns only fee for service claims.	Combo Box	Check Box	0
GCN	The Generic Code Number is a unique number representing the generic formulation.	Field	Number (Integer)	5
ICD Version	Code to denote which version of the ICD diagnosis code set is being referenced. The valid values will be '9' for ICD-9, '0' for ICD-10, or blank if corresponding code is not present..	Combo Box	Drop Down List Box	1
ICN	Internal control number that is assigned to each claim to track activity through the claim process.	Field	Number (Integer)	13
NDC [Search]	The National Drug Code used to uniquely identify a drug.	Hyperlink	N/A	0
Payment Date	This date identifies the date on which a claim was paid.	Field	Date (MM/DD/CCYY)	8
Prescription Number	The Prescription Number associated with a claim.	Field	Number (Integer)	12
Procedure Code From [Search]	The corresponding procedure code.	Hyperlink	N/A	0
Procedure Code To [Search]	The corresponding procedure code.	Hyperlink	N/A	0
Provider ID [Search]	Identifies the provider of services.	Hyperlink	N/A	0

Field	Description	Field Type	Data Type	Length
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Referring Provider [Search]	The Referring Provider identification number.	Hyperlink	N/A	0
Rendering Provider ID [Search]	The Rendering Provider identification number.	Hyperlink	N/A	0
Rendering Provider Specialty [Search]	Rendering Provider Specialty number.	Hyperlink	N/A	0
Revenue Code [Search]	This identifies a specific accommodation or ancillary service. Revenue codes are determined by the Centers for Medicare and Medicaid Services (CMS).	Hyperlink	N/A	0
Search	Searches for records based on the entered values.	Button	N/A	0
Status	The status of the claim like paid, denied, suspended, etc.	Combo Box	Drop Down List Box	0
TCN	The transaction control number used to identify claims on legacy system.	Field	Character	17
TDOS	To date of service. The last date of service that the claim was submitted for.	Field	Date (MM/DD/CCYY)	8
To Payment Date	This date identifies the date on which a claim was paid used for specifying an ending date for a range.	Field	Date (MM/DD/CCYY)	8
Warrant Number	Warrant Number.	Field	Character	9

6.35.4 Case Tracking Claims Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Diagnosis Code versions	Field	91003	From and To diagnosis code versions must be the same.	Please select the same diagnosis code versions.
Diagnosis Code From	Field	91004	Please enter the Diagnosis Code From	Please Select the Diagnosis Code From.
Diagnosis Code To	Field	91005	Please enter the Diagnosis Code To	Please Select the Diagnosis Code To.
FDOS	Field	1	FDOS is Required.	Please enter a FDOS.

Field	Field Type	Error Code	Error Message	To Correct
	Field	91001	Invalid Date.	Verify keying. The date must be in MM/DD/CCYY format.
	Field	91002	Date must be numeric.	Verify keying. The date must be in MM/DD/CCYY format.
Fee for Service Claim Only	Field	1	Choose Fee for Service Claim or Encounter Claim.	Verify Fee for Service Claim or Encounter Claim.
ICN	Field	1	ICN must be numeric.	Re-enter numeric ICN.
Payment Date	Field	1	From Payment Date must be less than or equal to Payment Date.	Verify and re-enter From Payment Date.
	Field	91001	Invalid Date.	Verify keying. The date must be in MM/DD/CCYY format.
	Field	91002	Date must be numeric.	Verify keying. The date must be in MM/DD/CCYY format.
Search	Button	1	At least one of ICN, Current ID, Provider ID, Rendering Provider ID, or ICN is required.	Enter a valid ICN, TCN, Current ID, Provider ID, or Rendering Provider ID.
TDOS	Field	91001	Invalid Date.	Verify keying. The date must be in MM/DD/CCYY format.
	Field	91002	Date must be numeric.	Verify keying. The date must be in MM/DD/CCYY format.

6.35.5 Case Tracking Claims Search Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.35.6 Case Tracking Claims Search Panel Accessibility

6.35.6.1 To Access the Case Tracking Claims Search Panel

Step	Action	Response
1	Enter **User Name** and **Password;** Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking Search.**	TPL AR Search panel displays.

Step	Action	Response
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL AR Maintenance panel displays.
6	Click **Claim** hyperlink.	Claim panel displays.
7	Click **Add**.	Claim Search panel displays.

6.35.6.2 To Add on the Case Tracking Claim Search Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **ICN**.	
3	Enter **Current ID** if different from one currently displayed. Click [Search] if Current ID is unknown.	
4	Enter **FDOS** in MM/DD/CCYY format.	
5	Enter **TDOS** in MM/DD/CCYY format.	
6	Enter **Provider ID**. Click [Search] if Provider ID is unknown.	
7	Enter **Rendering Provider ID**. Click [Search] if Rendering Provider ID is unknown.	
8	Select **Status** from drop down list box.	
9	Select **Records** from drop down list box.	
10	Click **Save**.	Case Tracking Claim Search information is saved.

6.36 Case Tracking Claims Search Results Panel Overview

6.36.1 Case Tracking Claims Search Results Panel Narrative

The Agency uses the Case Tracking Claims Search Results panel to view the itemized list of claims related to a specific case.

This panel is display only.

Navigation Path: [TPL] – [Case Tracking Search] - [(enter search criteria and click on Search)] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Claim] - [Add] - [Search]

6.36.2 Case Tracking Claims Search Results Panel Layout

6.36.3 Case Tracking Claims Search Results Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Amount Billed	This dollar amount identifies the billed amount of a claim.	Listview	Number (Decimal)	8
Amount Paid	This dollar amount identifies the amount paid on a claim..	Listview	Number (Decimal)	8
Claim Type	The type of claim billed to Medicaid. Identifies the type of claim like outpatient, inpatient, dental, etc.	Listview	Character	1
Date Paid	The date the claim was paid.	Listview	Date (MM/DD/CCYY)	10
FDOS	From date of service. The beginning date of service that the claim was submitted for.	Listview	Date (MM/DD/CCYY)	10
ICD Version	Code to denote which version of the ICD diagnosis code set is being referenced. The valid values will be '9' for ICD-9, '0' for ICD-10, or blank if corresponding code is not present	Listview	Character	1
ICN	Internal control number that is assigned to each claim to track activity through the claim process.	Listview	Number (Integer)	13
Primary Diag Code	The claim primary diagnosis code.	Listview	Character	7

Field	Description	Field Type	Data Type	Length
Primary Diag Desc	The claim primary diagnosis code description.	Listview	Character	40
Secondary Diag Code	The claim secondary diagnosis code.	Listview	Character	7
Secondary Diag Desc	The claim secondary diagnosis code description.	Listview	Character	40
Select All	Selects all claims in the search results.	Hyperlink	N/A	0
Status	The status of the claim like paid, denied, suspended, etc.	Listview	Character	1
TDOS	To date of service. The ending date of service that the claim was submitted for.	Listview	Date (MM/DD/CCYY)	10

6.36.4 Case Tracking Claims Search Results Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.36.5 Case Tracking Claims Search Results Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.36.6 Case Tracking Claims Search Results Panel Accessibility

6.36.6.1 To Access the Case Tracking Claims Search Results Panel

Step	Action	Response
1	Enter **User Name** and **Password**; Click **Login**.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL AR Maintenance panel displays.
6	Click **Claim** hyperlink.	Claim panel displays.
7	Click **Add**.	Claims Search panel displays.
8	Enter Search Criteria.	
9	Click **Search**.	Case Tracking Claims Search Results panel displays.

6.36.6.2 To Add on the Case Tracking Claims Search Results Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **ICN**.	
3	Enter **Current ID**.	
4	Enter **FDOS** in MM/DD/CCYY format.	
5	Enter **TDOS** in MM/DD/CCYY format.	
6	Enter **Provider ID**.	
7	Enter **Rendering Provider ID**.	
8	Select **Status** from drop down list box.	
9	Select number of **Records** from drop down list box.	
10	Click **Save**.	Case Tracking Claims Search Results information is saved.

6.37 Case Tracking Insurance Agent Panel Overview

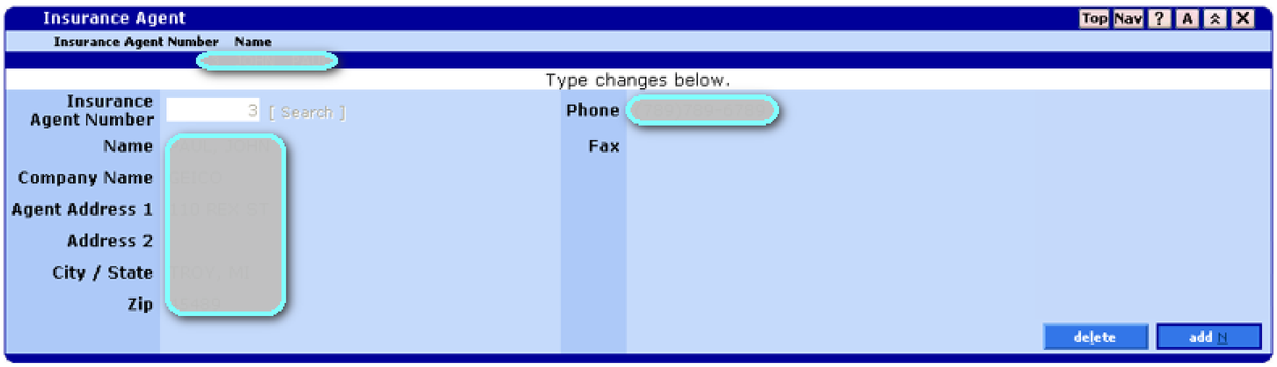
6.37.1 Case Tracking Insurance Agent Panel Narrative

The Case Tracking Insurance Agent panel is used to add or delete insurance agent information for the accident/injury case.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Case Tracking Search] - [Enter Search Criteria - Click Search] - [Select Row From Search Results] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Case Tracking Insurance Agent]

6.37.2 Case Tracking Insurance Agent Panel Layout



6.37.3 Case Tracking Insurance Agent Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Case Tracking Insurance Agent panel.	Button	N/A	0
Address 2	The second address line of the agent used for correspondence and liens.	Field	Character	55
Agent Address 1	The first address line of the agent used for correspondence and liens.	Field	Character	55
City / State	The city and state of the insurance agent where correspondence, cover letters, and liens are sent to.	Field	Character	32
Company Name	The company that the insurance agent is employed by.	Field	Character	40
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Fax	The insurance agent's fax number.	Field	Number (Integer)	15
Insurance Agent Number	Unique identifier assigned to each Insurance Agent.	Field	Number (Integer)	8

Field	Description	Field Type	Data Type	Length
Name	The insurance agent's first name and last name used to mail correspondence, cover letters, and liens.	Field	Character	25
Phone	The phone number where the insurance agent can be reached.	Field	Number (Integer)	15
Zip	The insurance agent's zip code where the correspondence, cover letters and liens are sent to.	Field	Number (Integer)	15

6.37.4 Case Tracking Insurance Agent Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Insurance Agent Number	Field	1	A valid Insurance Agent Number is required.	Enter a valid Insurance Agent Number.
	Field	3	A duplicate record can not be saved.	Enter a valid Insurance Agent Number.

6.37.5 Case Tracking Insurance Agent Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.37.6 Case Tracking Insurance Agent Panel Accessibility

6.37.6.1 To Access the Case Tracking Insurance Agent Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Maintenance panel displays.
6	Click **Insurance Agent** hyperlink.	Insurance Agent panel displays.

6.38 Case Tracking Letter Panel Overview

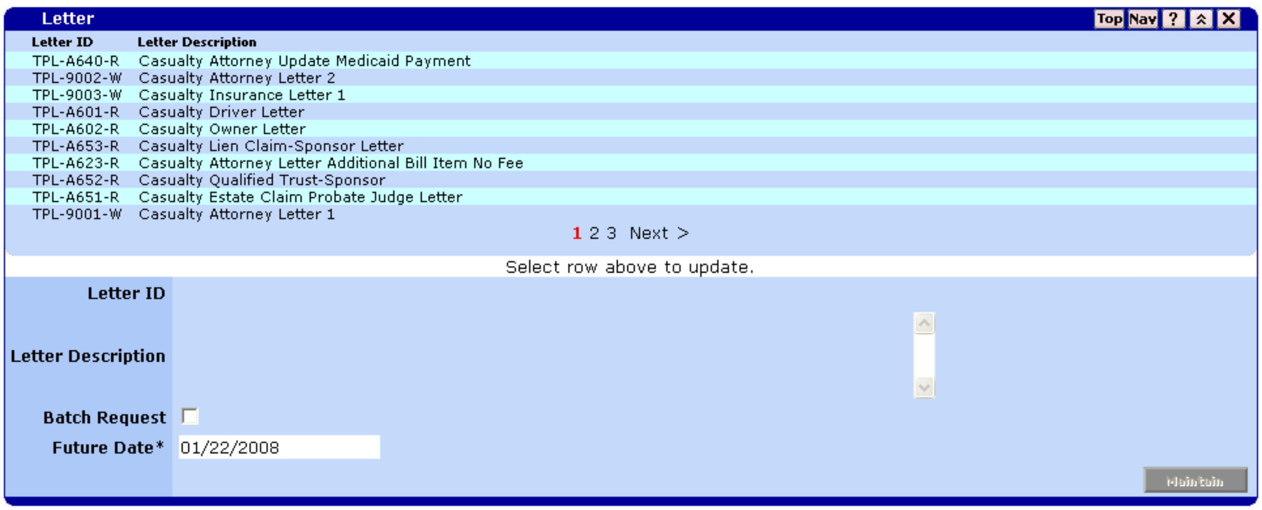
6.38.1 Case Tracking Letter Panel Narrative

The Case Tracking Letter panel allows the user to select a letter for the casualty case.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Case Tracking Search] - [(enter search criteria and click on Search)] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Letter]

6.38.2 Case Tracking Letter Page Layout



6.38.3 Case Tracking Letter Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Batch Request	When the checkbox is clicked, the batch is requested.	Combo Box	Checkbox	0
Future Date	The expected date of the letter to be batched.	Field	Date (MM/DD/CCYY)	8
Maintain	Allows the user to manually print a letter.	Button	N/A	0
Letter Description	The description of the letter.	Field	Character	4000
Letter ID	The identifier of the letter.	Field	Character	10

6.38.4 Case Tracking Letter Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.38.5 Case Tracking Letter Panel Extra Features

As a standard, all Case Tracking letters begin with the description of 'Cas%' and the ID of the letter begins with 'TPL-'. This allows the system to automatically pick up any newly added letters to the system.

Based upon the schema described above, the extract for this panel is a query against the T_LG_LETTER_TEMPLATE table for the ID_LETTER and DSC_LETTER fields.

Once a letter is selected, the system sends to the letter generate the sak_casualty for the case currently being worked on to the letter generator as a parameter.

6.38.6 Case Tracking Letter Panel Accessibility

6.38.6.1 To Access the Case Tracking Letter Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL AR Maintenance panel displays.
6	Click **Letter** hyperlink.	Case Tracking Letter panel displays.

6.38.6.2 To Update the Case Tracking Letter Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Case Tracking Letter information is saved.

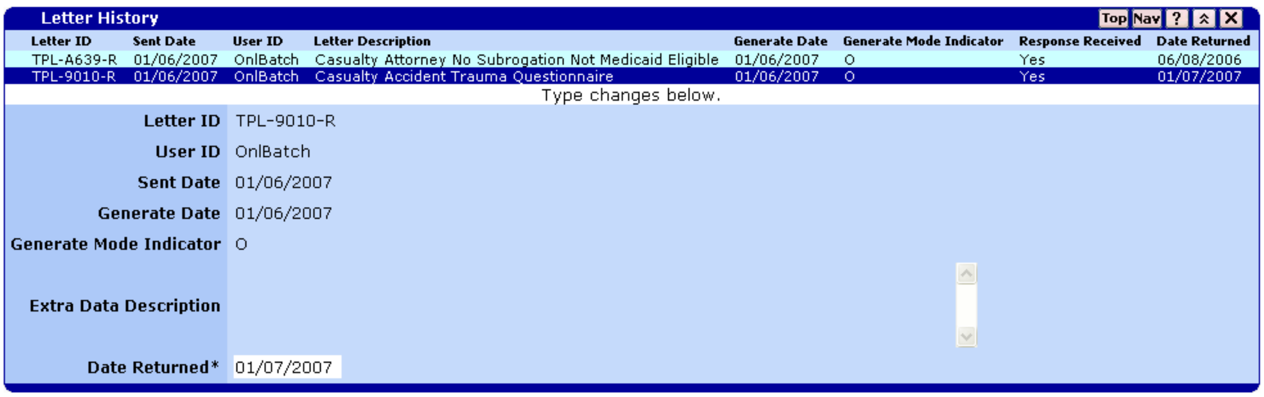
6.39 Case Tracking Letter History Panel Overview

6.39.1 Case Tracking Letter History Panel Narrative

The Case Tracking Letter History panel displays all letters sent for a casualty case.

Navigation Path: [TPL] – [Case Tracking Search] - [(enter search criteria and click on Search)] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Letter History]

6.39.2 Case Tracking Letter History Panel Layout



6.39.3 Case Tracking Letter History Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Date Returned	The date the letter was returned.	Field	Date (MM/DD/CCYY)	8
Extra Data Description	Gives additional description about the request.	Field	Character	4000
Generate Date	Contains the date the letter was generated.	Field	Date (MM/DD/CCYY)	8
Generate Mode Indicator	Indicates the mode in which the letter was generated.	Field	Character	1
Letter Description	The description of the letter.	Field	Character	55
Letter ID	Identification of the letter available for print.	Field	Character	20
Response Received	Yes or No indicator showing if a response has or has not been received for this letter.	Field	Character	3
Sent Date	This field holds the date the letter was sent to track when letters are sent.	Field	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
User ID	The user's identification number that requested the letter.	Listview	Character	8

6.39.4 Case Tracking Letter History Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Date Returned	Fields	1	Return Date should be less than or equal to 12/31/2299.	Enter a date of return less than or equal to 12/31/2299.
	Fields	2	Return Date should be equal to or greater than to 01/01/1900.	Enter a date of return greater than or equal to 01/01/1900.
	Fields	3	Return Date should not be prior to Sent Date or Generate Date.	Enter a date of return greater than or equal to Sent Date or Generate Date.
	Fields	4	Return Date not valid.	Enter a date or return.

6.39.5 Case Tracking Letter History Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.39.6 Case Tracking Letter History Panel Accessibility

6.39.6.1 To Access the Case Tracking Letter History Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL AR Maintenance panel displays.
6	Click **Letter History** hyperlink.	Case Tracking Letter History panel displays.

6.39.6.2 To Update the Case Tracking Letter History Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Case Tracking Letter History information is saved.

6.40 Case Tracking Lien Information Panel Overview

6.40.1 Case Tracking Lien Information Panel Narrative

The Case Tracking Lien panel is used to maintain lien information related to a case.

This panel is inquiry only.

Navigation Path: [TPL] – [Case Tracking Search] - [(Enter search criteria and click on [Search])] - [(Select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Lien]

6.40.2 Case Tracking Lien Information Panel Layout

6.40.3 Case Tracking Lien Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
City	This city of the entity that the lien was issued against.	Field	Character	25
Country [Search]	This country of the entity that the lien was issued against.	Hyperlink	N/A	0
Lien Address 1	The first address line of the entity to which a lien was issued against.	Field	Character	55
Lien Address 2	The second address line of the entity to who a lien was issued against.	Field	Character	55
Lien Released Date	The date that the lien was released.	Field	Date (MM/DD/CCYY)	8
Lien Sent Date	The date that the lien was sent.	Field	Date (MM/DD/CCYY)	8
State	The state of the entity that the lien was issued against.	Combo Box	Drop Down List Box	0
Zip	The first five digits and last four digits of the zip code of the entity that the lien was issued against.	Field	Number (Integer)	9

6.40.4 Case Tracking Lien Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
City	Field	1	You must enter a City.	City is required when Lien Address 1 is captured.
Country	Field	1	Country is invalid.	Enter a valid code or use the search option.
Lien Address 1	Field	1	Street address 1 is Required! Please Enter a Value.	If City, Lien Address 2 or State are captured, Lien Address 1 is required.
Lien Address 2	Field	1	You must enter a Street1 before you can enter a Street 2.	If Lien Address 2 is captured, Lien Address 1 must also be captured.
Lien Released Date	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter a valid date.
Lien Sent Date	Field	2	Invalid date. Format is MM/DD/CCYY.	Enter a valid date.
Zip	Field	1	Enter a valid value.	Enter 4 Numeric Digits on the ZIP-4 code box.
	Field	2	ZIP code needs to be only numeric values.	Enter only numeric digits in the Zip code box.
	Field	3	ZIP code needs to be 5 numeric digits.	ZIP code must be 5 digits when Country is US.
	Field	4	ZIP code is required when ZIP-4 code exists.	If ZIP-4 was captured, then ZIP code must be too.
	Field	5	You must enter a Zip Code.	Enter a Zip Code.

6.40.5 Case Tracking Lien Information Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.40.6 Case Tracking Lien Information Panel Accessibility

6.40.6.1 To Access the Case Tracking Lien Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.

Step	Action	Response
5	Select row from search results.	Case Tracking Maintenance panel displays.
6	Click **Lien Information** hyperlink.	Lien Information panel displays.

6.40.6.2 To Add on the Case Tracking Lien Information Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Lien Sent Date** in MM/DD/CCYY format.	
3	Enter **Lien Release Date** in MM/DD/CCYY format.	
4	Enter Lien Address 1.	
5	Enter Lien Address 2.	
6	Enter **City**.	
7	Select **State** from the drop down list.	
8	Enter Zip Code +4.	
9	Enter **Country**. If unknown, use [Search] button to locate Country number.	
10	Click **Save**.	Lien information is saved.

6.41 Case Tracking Offline Claims Panel Overview

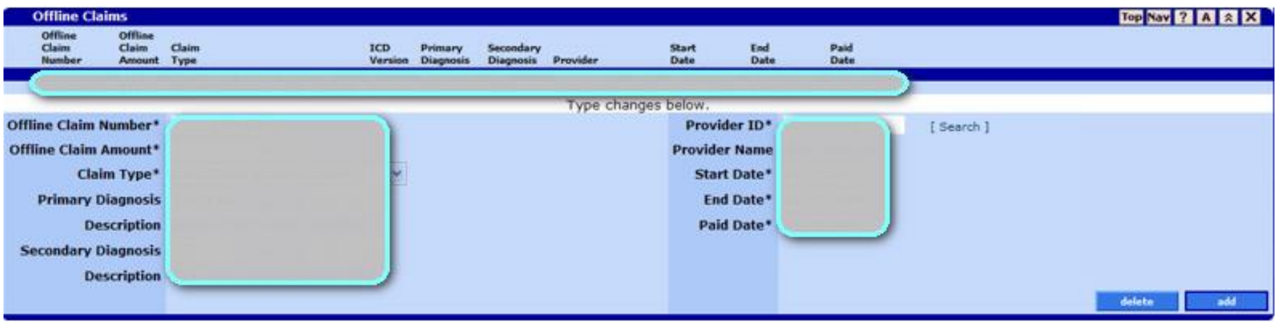
6.41.1 Case Tracking Offline Claims Panel Narrative

The Case Tracking Offline Claims panel is used by the Agency to enter and track offline claims tied to a specific case.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Case Tracking Search] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL case Tracking] - [Offline Claims]

6.41.2 Case Tracking Offline Claims Panel Layout



6.41.3 Case Tracking Offline Claims Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Case Tracking Offline Claims panel.	Button	N/A	0
Claim Type	Code that specifies the type of claim record.	Field	Character	1
Delete	Allows the user to remove offline claim information.	Button	N/A	0
End Date	End date for service for the current offline claim.	Field	Date (MM/DD/CCYY)	8
ICD Version	Code to denote which version of the ICD diagnosis code set is being referenced.The valid values are '9' for ICD-9, '0' for ICD-10 or blank if corresponding code is not present.	Field	Character	1
Offline Claim Amount	Amount charged by provider for the current offline claim.	Field	Number (Decimal)	9

Field	Description	Field Type	Data Type	Length
Offline Claim Number	Number that identifies the Offline Claim being entered and that is associated with current TPL Case.	Listview	Number (Integer)	17
Paid Date	Date when claim was paid.	Field	Date (MM/DD/CCYY)	8
Primary Diagnosis	Primary diagnosis identified when service was rendered. A code for the condition requiring medical attention.	Field	Character	7
[Primary Diagnosis] Description	The description of the primary diagnosis code.	Field	Character	60
Provider ID	Provider identification value.	Field	Character	15
Provider Name	The name associated with an organization or person.	Field	Character	50
Secondary Diagnosis	Secondary diagnosis identified when service was rendered. A code for the condition requiring medical attention.	Field	Character	7
[Secondary Diagnosis] Description	The description of the secondary diagnosis code.	Field	Character	60
Start Date	Start date of service for the current offline claim.	Field	Date (MM/DD/CCYY)	8

6.41.4 Case Tracking Offline Claims Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Claim Type	Field	1	A valid Claim Type is required.	Select a valid Claim Type.
End Date	Field	1	Invalid date.	Enter the End Date in the correct format.
	Field	2	End Date must be greater than or equal to 01/01/1900.	Enter a date greater than 01/01/1900.
	Field	3	Offline Claim End Date is required.	Enter a valid End Date.
Offline Claim Amount	Field	1	Offline Claim Amount must be greater than or equal to 0.01.	Enter a claim amount.
	Field	2	Offline Claim Amount is required.	Enter a valid amount.
Paid Date	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter the Paid Date in the correct format.
	Field	2	Paid Date must be greater than or equal to 01/01/1900.	Enter a date greater than 01/01/1900.

Field	Field Type	Error Code	Error Message	To Correct
	Field	3	Paid Date is required.	Enter a valid paid date.
Primary Diagnosis	Field	1	A valid Primary Diagnosis Code is required.	Enter a valid Diagnosis Code.
	Field	2	Primary and Secondary diagnosis code versions must be the same.	Please select the same diagnosis code versions.
Provider ID	Field	1	A valid Group Provider is required.	Enter a valid Provider ID.
Secondary Diagnosis	Field	1	A valid Secondary Diagnosis Code is required.	A valid Secondary Diagnosis Code is required.
Start Date	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter the Start Date in the correct format.
	Field	2	Offline Claim Start Date must be greater than or equal to 01/01/1900.	Enter a date greater than 01/01/1900.
	Field	3	Offline Claim Start Date is required.	Enter a valid start date.

6.41.5 Case Tracking Offline Claims Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.41.6 Case Tracking Offline Claims Accessibility

6.41.6.1 To Access the Case Tracking Offline Claims Panel

Step	Action	Response
1	Enter **User Name** and **Password**; Click **Login**.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking.**	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search.**	Search results display.
5	Select row from search results.	Case Tracking Maintenance panel displays.
6	Click **Offline Claims** hyperlink.	Offline Claims panel displays.

6.42 Case Tracking Recovery Panel Overview

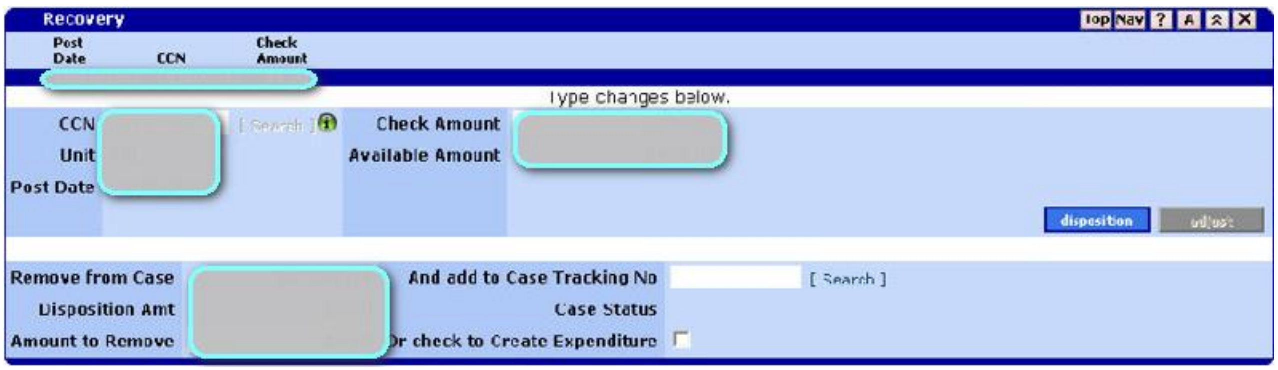
6.42.1 Case Tracking Recovery Panel Narrative

The Case Tracking Recovery panel is utilized by the Agency to enter a CCN associated with a settlement.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Case Tracking Search] - [(enter search criteria and click on Search)] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Recovery]

6.42.2 Case Tracking Recovery Panel Layout



6.42.3 Case Tracking Recovery Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Adjust	This button navigates the user to the TPL Case Tracking Disposition Adjustment Panel.	Button	N/A	0
Amount to Remove	The amount to transfer from the case to the case entered or Expenditure.	Field	Number (Decimal)	15
And add to Case Tracking No	The case number where the money is going to be transfered. If Expenditure is selected, this field will be disabled.	Field	Character	9
Available Amount	Available amount in the selected CCN. Is the result of the Amount paid minus the dispositions to that CCN. This field is display only.	Field	Number (Decimal)	12
Case Status	This shows the status of the Case the money is being transfered to. This status cannot be any of the Closed statuses.	Label	N/A	0
CCN	Cash control number.	Field	Number (Integer)	11

Field	Description	Field Type	Data Type	Length
Check Amount	The total dollar amount of the case settlement.	Field	Number (Decimal)	9
Disposition	This button allows the user to enter dispositions for a case.	Button	N/A	0
Disposition Amt	The total dollar amount of the disposition.	Label	N/A	0
Or check to Create Expenditure	Check this box to create an Expenditure.	Combo Box	Checkbox	0
Post Date	The date that the casualty case was posted.	Label	Date (MM/DD/CCYY)	8
Remove from Case	This is the Case Number currently being worked on. This field is display only.	Label	N/A	0
Unit	Cash recipient Unit, it can be TPL, HIPP or Non-TPL. This field is display only.	Field	Character	13

6.42.4 Case Tracking Recovery Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
And add to Case Tracking No	Field	1	Warning: Target case does not exist.	This is a warning that will post before saving. When the user enters a case that does not exist in the database.
	Field	2	Adjustment - TO Case cannot be in closed status.	The target Case cannot be in any of the closed statuses.
	Field	3	Adjustment - From Case cannot be the same as To case.	Enter a different target Case number. It cannot be the same as the sending case.
	Field	4	Adjustment - Invalid case selected. The Case must have Claims associated.	The Case that is receiving the moneys must have at least one Claim associated to it.
	Field	5	Adjustment - Must have either Add to Case Tracking or Create Expenditure.	Must have a valid destination Casualty Case or check the expenditure checkbox.
	Field	6	Warning: Target case must have Claims associated with it.	This is a warning that will post before saving. When the user enters a case that does not have Claims associated with it.

Field	Field Type	Error Code	Error Message	To Correct
	Field	7	Warning: Target case cannot be in closed status.	This is a warning that will post before saving. When the user enters a case that has a Closed Status. Closed Cases cannot be dispositioned anymore.
Amount to Remove	Field	1	Adjustment - must have Amount to Remove greater than 0.	Enter an Amount greater than zero.
	Field	2	Adjustment - Amount to Remove cannot exceed the Disposition amount.	Enter an amount less than the Disposition Amount.
Disposition	Button	1	Important: Disposition Amounts exceed the Original Case Amount.	Verify disposition does not exceed original case amount.
	Button	2	Carrier is required if Claims have been associated with the case.	Verify carrier is associated.
	Button	3	Invalid User ID. User ID is not listed in the security table.	Verify User ID.
CCN	Field	1	Selected CCN is not valid or does not exist.	Select a valid CCN.
	Field	2	Selected CCN does not have a TPL Unit. This CCN cannot be used for this Recovery.	Choose a CCN that has a unit of TPL (200)
	Field	3	Selected CCN is on Insufficient Funds status.	The check is in "Insufficient Funds" status. Choose another CCN.
	Field	7142	A valid Cash Receipt is required.	Click search and select one from the list.
Check Amount	Field	1	Amount is required.	Enter an amount.
	Field	2	Disposition amount exceeds case total.	This is a warning. The Check Amount in the disposition is greater than the Original Case Total or Revised Case Total (if calculated).

Field	Field Type	Error Code	Error Message	To Correct
	Field	3	The Recovery Amount must be greater than zero.	Verify keying. Enter a Recovery Amount greater than zero.
	Field	4	Recovery Amount exceeds available check amount.	Verify keying. Enter a Recovery Amount less than the check amount.
	Field	5	Amount must be less than or equal to 9999999.99.	Enter an amount up to 9999999.99.
	Field	6	Disposition amount exceeds the Case Total.	This is a Warning. The sum of all dipositions are more than the Original Case Total or Revised Case Total (if calculated). This warning will only appear if the case is being closed.
Or check to Create Expenditure	Check Box	1	Adjustment - Must have either Add to Case Tracking or Create Expenditure.	Must have a valid destination Casualty Case or check the expenditure checkbox.

6.42.5 Case Tracking Recovery Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.42.6 Case Tracking Recovery Panel Accessibility

6.42.6.1 To Access the Case Tracking Recovery Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	TPL AR Maintenance panel displays.
6	Click **Recovery** hyperlink.	Recovery panel displays.

6.42.6.2 To Update on the Case Tracking Recovery Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.

Step	Action	Response
2	Click in desired field to update and perform update.	
3	Click **Save**.	Case Tracking Recovery information is saved.

6.43 Case Tracking Related Cases Panel Overview

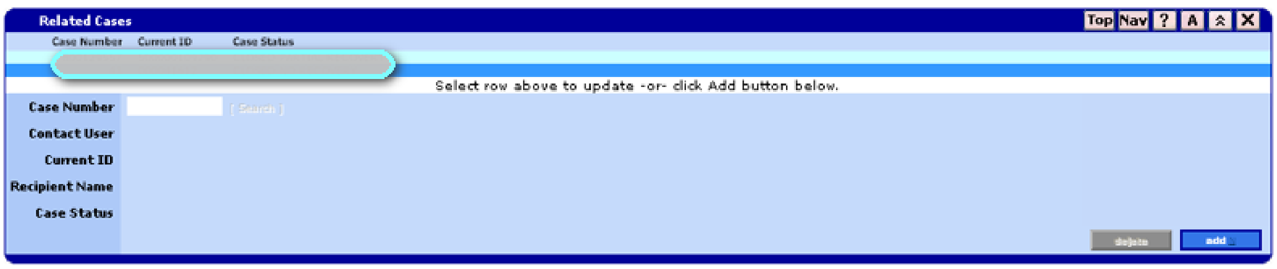
6.43.1 Case Tracking Related Cases Panel Narrative

The Case Tracking Related Case panel is utilized by the Agency to inquire about other open cases related to a recipient.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Case Tracking Search] - [(enter search criteria and click on Search)] - [(select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Related Cases]

6.43.2 Case Tracking Related Cases Panel Layout



6.43.3 Case Tracking Related Cases Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Case Tracking Related Cases panel.	Button	N/A	0
Case Number	The unique identifier for a casualty case. Used by account to identify the casualty cases on reports.	Field	Number (Integer)	9

Field	Description	Field Type	Data Type	Length
Case Status	This field is used to identify the current status of the case. Valid values include: A = Recovered MAX-The total case amount was collected and dispositioned. This is a closed case. B = In Compromise-The responsible party is negotiating a lower settlement amount. This is an open case. F = Closed Full Amount-The full settlement amount has been received and dispositioned. This is a closed case. I = Intake-A lead has been received for potential recovery and the case has been added, but further research is needed for pursuing recoveries. This is an open case. L = Lead Review-The case has been transferred to a supervisor or designee for review. This is an open case. M = Closed Partial Recovery-The total case amount was not collected, but a partial recovery was received and dispositioned. This is a closed case. N = No Further Pursuit-After further research, it was determined the case should not be pursued. This is a closed case. O = Open Case-All research has been completed and the case should be pursued. This is an open case. X = Closed No Recovery-The case was pursued, but no money is recoverable. This is a closed case. B = REF TPL Investigator-The case has been referred to a TPL Investigator for further analysis. This is an open case.	Field	Character	0
Contact User	The user ID assigned to the related case.	Field	Character	8
Current ID	Unique identifier for the recipient.	Field	Number (Integer)	12
Delete	Deletes the current record.	Button	N/A	0
Recipient Name	The name of the responsible person for this case.	Field	Character	40

6.43.4 Case Tracking Related Cases Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Case Number	Field	1	Enter a valid value.	Case number is a numeric only field.
	Field	2	This Related Case is already in the list.	Select another different Case Number not already listed in the Datalist.
	Field	3	Cannot relate to itself.	Select another different Case Number than the Case you are Relating Cases to.
	Field	4	A valid Casualty Case is required.	Enter or select a case number.
Current ID	Field	1	A valid Base is required.	Enter a valid Current ID.

6.43.5 Case Tracking Related Cases Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.43.6 Case Tracking Related Cases Panel Accessibility

6.43.6.1 To Access the Case Tracking Related Cases Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Maintenance panel displays.
6	Click **Related Cases** hyperlink.	Related Cases panel displays.

6.43.6.2 To Add on the Case Tracking Related Cases Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Case Number** or click [Search] to look for case number by Current ID, Recipient SSN, Recipient DOB, Recipient Last Name, Recipient First Name, User ID or Case Type.	Contact Name, Current ID, Recipient Name and Case Status are automatically populated.
3	Click **Save**.	Related Cases information is saved.

6.43.6.3 To Update on the Case Tracking Related Cases Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Related Cases information is saved.

6.43.6.4 To Delete on the Case Tracking Related Cases Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.44 Case Tracking Tortfeasor Case Xref Panel Overview

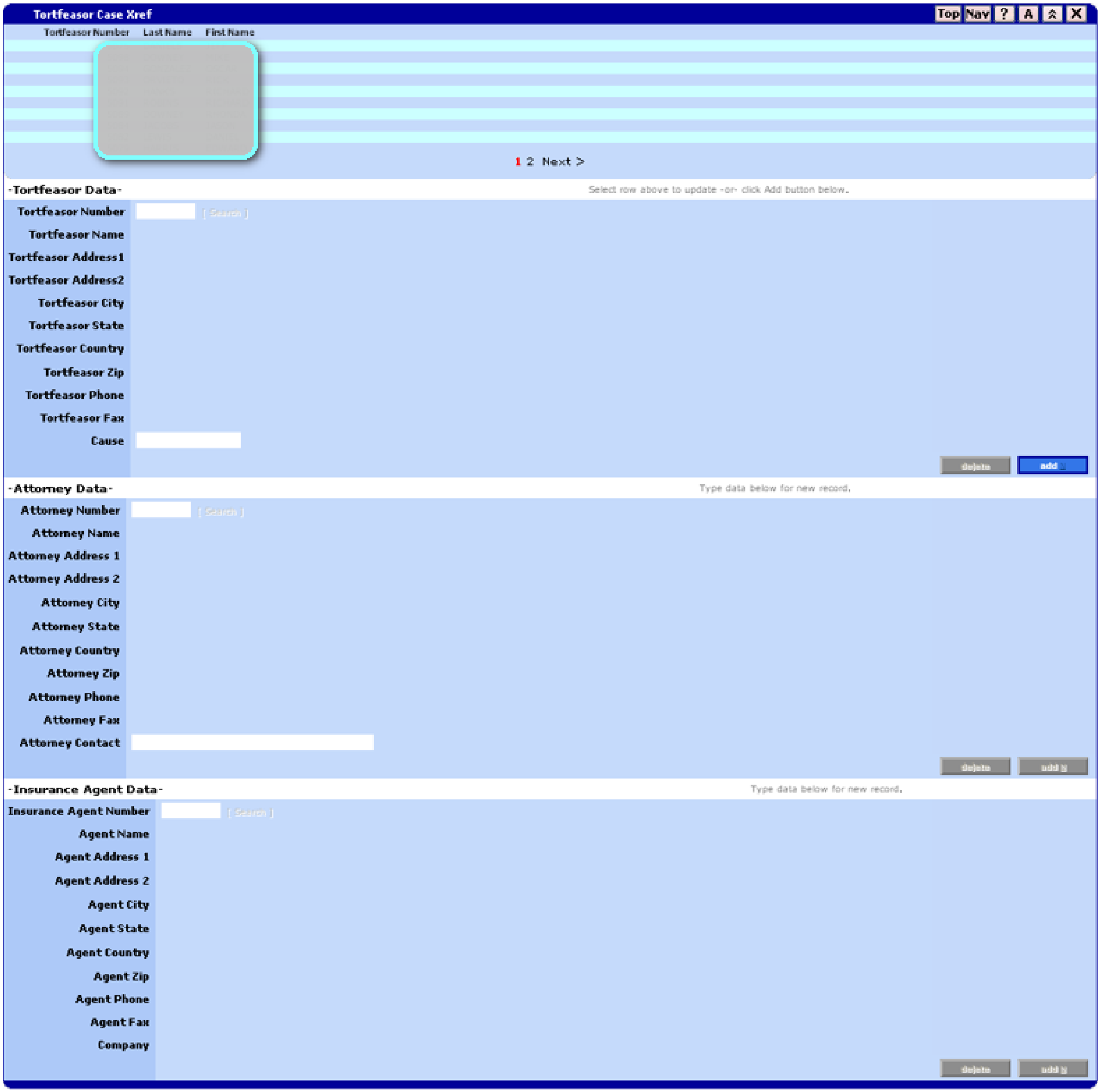
6.44.1 Case Tracking Tortfeasor Case Xref Panel Narrative

The Case Tracking Tortfeasor Case Xref panel lists the Tortfeasor Cross-references associated with a case.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: Navigation Path: [TPL] – [Case Tracking Search] - [(Enter search criteria and click on [Search])] - [(Select row from search results)] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Tortfeasor Case Xref]

6.44.2 Case Tracking Tortfeasor Case Xref Panel Layout



6.44.3 Case Tracking Tortfeasor Case Xref Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add (Attorney Panel)	Add a new attorney record.	Button	N/A	0
Add (Insurance Panel)	Add a new insurance record.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
Add (Tortfeasor Panel)	Add a new tortfeasor record.	Button	N/A	0
Delete (Attorney Panel)	Delete an attorney record.	Button	N/A	0
Delete (Insurance Panel)	Delete an insurance record.	Button	N/A	0
Delete (Tortfeasor Panel)	Delete a tortfeasor record.	Button	N/A	0
Agent Address 1	The first street address of the insurance agent where the correspondence, cover letters, and liens are sent.	Field	Character	55
Agent Address 2	The second street address of the insurance agent where the correspondence, cover letters and liens are sent.	Field	Character	55
Agent City	The city of the insurance agent where correspondence, cover letters, and liens are sent.	Field	Character	30
Agent Country	The country of the insurance agent where correspondence, cover letters, and liens are sent.	Field	Character	2
Agent Fax	The insurance agent's fax number.	Field	Number (Integer)	15
Agent Name	The insurance agent's last, first name, middle initial used to mail correspondence, cover letters, and liens.	Field	Character	25
Agent Phone	The phone number where the insurance agent can be reached.	Field	Number (Integer)	15
Agent State	The city of the insurance agent where correspondence, cover letters, and liens are sent.	Field	Character	2
Agent Zip	The insurance agent's zip code where the correspondence, cover letters and liens are sent to.	Field	Number (Integer)	15
Attorney Address 1	The first address line of the attorney used for correspondence and liens.	Field	Character	30
Attorney Address 2	The second address line of the attorney used for correspondence and liens.	Field	Character	30
Attorney City	The attorney's city that the correspondence and liens are sent.	Field	Character	30

Field	Description	Field Type	Data Type	Length
Attorney Contact	The name of the person that is used when contacting the attorney's office.	Field	Character	32
Attorney Country	The attorney's country code that the correspondence and liens are sent.	Field	Character	2
Attorney Fax	The fax number in the format area code + prefix + suffix.	Field	Number (Integer)	10
Attorney Name	The last, first, middle name of the attorney used for correspondence and liens.	Field	Character	29
Attorney Number	Unique identifier assigned to each attorney.	Field	Number (Integer)	8
Attorney Phone	The phone number of the attorney.	Field	Number (Integer)	10
Attorney State	The attorney's state code that the correspondence and liens are sent.	Field	Character	2
Attorney Zip	The first 5 digits and the last 4 digits of the zip code for the attorney.	Field	Number (Integer)	9
Cause	The cause number that the county courthouse puts on the lien for a torfeasor and a particular case.	Field	Character	15
Company (Insurance Panel)	The company that the insurance agent is employed by.	Field	Character	40
Insurance Agent Number	An account assigned number to an individual insurance company.	Field	Number (Integer)	8
Tortfeasor Address1	The first street address of the tortfeasor's where the correspondence, cover letters, and liens are sent to.	Field	Character	30
Tortfeasor Address2	The second street address of the tortfeasor's where the correspondence, cover letters, and liens are sent.	Field	Character	30
Tortfeasor City	The city of the tortfeasor where the correspondence, cover letters, and liens are sent.	Field	Character	15
Tortfeasor Country	The country code of the tortfeasor where the correspondence, cover letters, and liens are sent.	Field	Character	2
Tortfeasor Fax	The fax number of the tortfeasor.	Field	Number (Integer)	10
Tortfeasor Name	The last, first, middle name of the tortfeasor used to address the correspondence, cover letters, and liens.	Field	Character	29

Field	Description	Field Type	Data Type	Length
Tortfeasor Name	The last, first, middle name of the tortfeasor used to address the correspondence, cover letters, and liens.	Field	Character	29
Tortfeasor Number	The account assigned number of the tortfeasor.	Field	Number (Integer)	8
Tortfeasor Phone	The phone number where the tortfeasor can be reached.	Field	Number (Integer)	10
Tortfeasor State	The state of the tortfeasor where the correspondence, cover letters, and liens are sent.	Field	Character	2
Tortfeasor Zip	The tortfeasor's zip code where the correspondence, cover letters, and liens are sent.	Field	Number (Integer)	5

6.44.4 Case Tracking Tortfeasor Case Xref Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Attorney Contact	Field	44	Contact is required.	Enter a valid Contact.
Attorney Number	Field	22	A valid Attorney Number is required.	Enter or select a valid Attorney Number.
	Field	25	Attorney Number must be numeric.	Enter a valid Attorney Number.
	Field	26	Attorney does not exist, please verify.	Enter a valid Attorney Number.
Tortfeasor Number	Field	20	A valid Tortfeasor Number is required.	Enter a valid Tortfeasor Number.
	Field	22	Tortfeasor does not exist, please verify.	Enter a valid Tortfeasor Number.
	Field	23	Tortfeasor Number must be numeric.	Enter a valid Tortfeasor Number.
	Field	32	This Tortfeasor is already in the list.	Enter a different Tortfeasor Number.
Insurance Agent Number	Field	66	A valid Insurance Agent Number is required.	Enter a valid Insurance Agent Number.
	Field	67	Insurance Agent Number does not exist, please verify.	Enter a valid Insurance Agent Number.
	Field	68	Insurance Agent Number must be numeric.	Enter a valid Insurance Agent Number.

6.44.5 Case Tracking Tortfeasor Case Xref Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.44.6 Case Tracking Tortfeasor Case Xref Panel Accessibility

6.44.6.1 To Access the Case Tracking Tortfeasor Case Xref Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	TPL AR Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Maintenance panel displays.
6	Click Tortfeasor Case Xref hyperlink.	Tortfeasor Case Xref panel displays.

6.44.6.2 To Add on the Case Tracking Tortfeasor Case Xref Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Tortfeasor Number. If unknown, use [Search] button to locate.	Name, Address, City, State, Country, Zip, Phone and Fax of Tortfeasor are automatically populated.
3	Enter **Cause**.	
4	Click **Save**.	Tortfeasor Case Xref information is saved.

6.44.6.3 To Update on the Case Tracking Tortfeasor Case Xref Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Tortfeasor Case Xref information is saved.

6.44.6.4 To Delete on the Case Tracking Tortfeasor Case Xref Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.45 Case Tracking Trustee Panel Overview

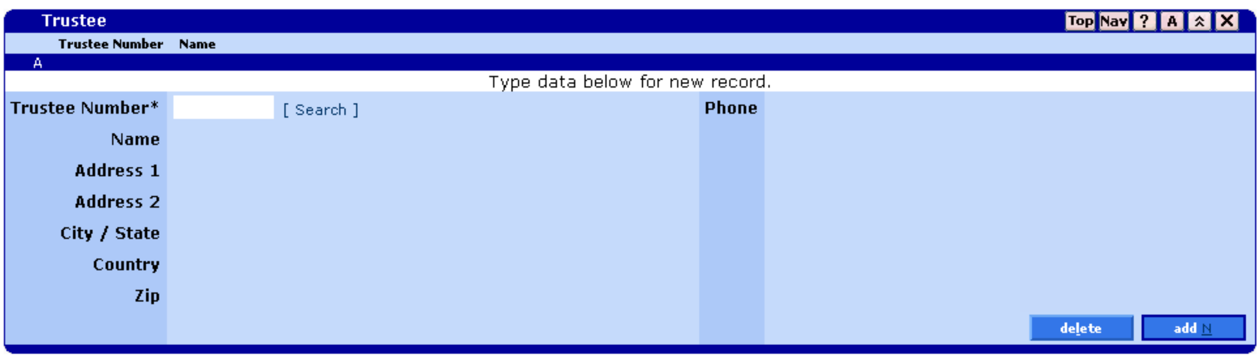
6.45.1 Case Tracking Trustee Panel Narrative

The Case Tracking Trustee panel is used to add or delete trustees associated to a trust recovery case. This panel is only enabled if the case type is equal to A, B, or C.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Case Tracking Search] - [Enter Search Criteria - Click Search] - [Select Row From Search Results] - [Case Tracking Maintenance] - [TPL Case Tracking] - [Trustee]

6.45.2 Case Tracking Trustee Panel Layout



6.45.3 Case Tracking Trustee Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Case Tracking Trustee panel.	Button	N/A	0
Address 1	Address of the trustee.	Field	Character	55
Address 2	Address 2 of the trustee.	Field	Character	55
City\State	City and state of executor.	Field	Character	32
Country	Code associated with the country.	Field	Character	3
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Name	Recipient’s trustee's last name, first name and middle initial.	Field	Character	36
Trustee Number [Search]	Unique system assigned number for each trustee.	Hyperlink	N/A	0

Field	Description	Field Type	Data Type	Length
Zip	The first 5 digits and the last 4 digits of the zip code for the trustee. It can be an international address zip code.	Field	Number (Integer)	24

6.45.4 Case Tracking Trustee Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Trustee Number	Field	1	A valid Trustee is required.	Enter or select a valid Trustee number.
	Field	2	This Trustee is already in the list.	Choose another Trustee, the one you have chosen was already associated with this case.
	Field	3	Recipient's Current ID must be selected before selecting Trustee.	Enter the recipient number in the Casualty Case Base Information Panel before trying to associate Trustees to the case.
	Field	4	Trustee Number must be numeric.	Only numeric values are allowed on Trustee Number.
	Field	5	Trustee does not exist or does not meet the requirements for this case, please verify.	There are three reasons why this message is posted. One, the Recipient ID on the Trustee panel does not match the one on the Case's Recipient Current ID. Two, the Record does not exist. This record in the T_TPL_CASE_INFO table has a Type of Trustee.

6.45.5 Case Tracking Trustee Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.45.6 Case Tracking Trustee Panel Accessibility

6.45.6.1 To Access the Case Tracking Trustee Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Case Tracking**.	Case Tracking Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	Search results display.
5	Select row from search results.	Case Tracking Maintenance panel displays.
6	Click **Trustee** hyperlink.	Case Tracking Trustee panel displays.

Step	Action	Response
	Note: This link is only enabled if the Case Type is = A, B or C.	

6.45.6.2 To Add on the Case Tracking Trustee Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Trustee Number. If unknown, use [Search] button to locate by last name or first name.	Name, Address, City/State, Country, Phone and Zip are automatically populated.
3	Click **Save**.	Case Tracking Trustee information is saved.

6.45.6.3 To Update the Case Tracking Trustee Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Case Tracking Trustee information is saved.

6.45.6.4 To Delete on the Case Tracking Trustee Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.46 HIPP Case Search Panel Overview

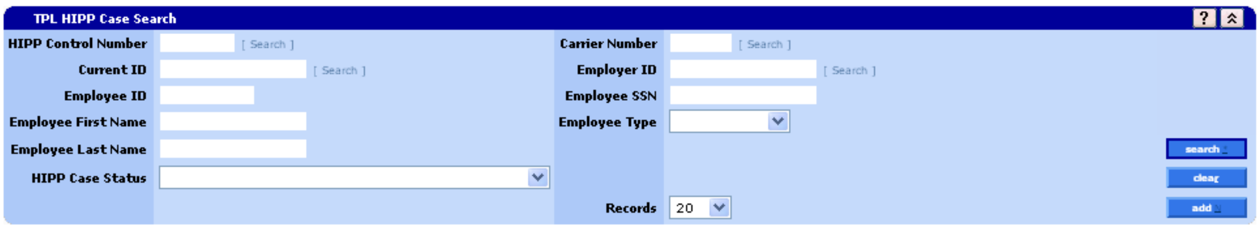
6.46.1 HIPP Case Search Panel Narrative

The HIPP Case Search panel allows the user to enter search criteria and query for HIPP Case records whose data matches that criteria.

This panel is inquiry only.

Navigation Path: [TPL] – [HIPP Case Search]

6.46.2 HIPP Case Search Panel Layout



6.46.3 HIPP Case Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the HIPP Case Search panel.	Button	N/A	0
Carrier Number	Carrier Number Identifier.	Field	Alphanumeric	7
Clear	Allows the user to remove search information from the panel.	Button	N/A	0
Current ID [Search]	This allows the user to search for a Case Number.	Hyperlink	N/A	0
Employee First Name	Search by the employee's first name.	Field	Alphanumeric	15
Employee ID	Search by an employee identification number.	Field	Number (Integer)	12
Employee Last Name	Search by the employee's last name.	Field	Alphanumeric	15
Employee SSN	Search by the employee's Social Security Number.	Field	Number (Integer)	9
Employee Type	Search by the employee type. This type can be a policyholder or recipient.	Combo Box	Drop Down List Box	0
Employer ID	Employer identification number.	Field	Alphanumeric	7
HIPP Case Status	This is the status of the HIPP Case.	Combo Box	Drop Down List Box	0

Field	Description	Field Type	Data Type	Length
HIPP Control Number	Search by the HIPP control number assigned to a case.	Field	Alphanumeric	9
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0

6.46.4 HIPP Case Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Search	Button	1	Please enter at least one search field.	Need to enter a value in one of the search fields.

6.46.5 HIPP Case Search Panel Extra Features

Linking Recipient IDs

If the user enters a current ID, the panel determines if the ID entered is active. If not, the panel will retrieve and display the records based on the active ID.

6.46.6 HIPP Case Search Panel Accessibility

6.46.6.1 To Access the HIPP Case Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search.**	HIPP Case Search panel displays.

6.47 HIPP Case Search Results Panel Overview

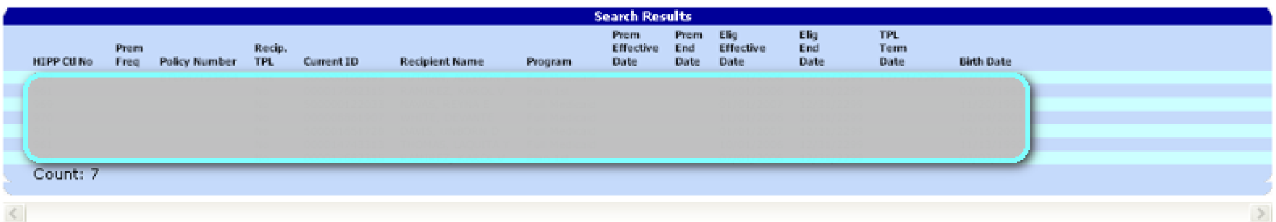
6.47.1 HIPP Case Search Results Panel Narrative

The HIPP Case Search Results panel displays HIPP Case records matching the criteria from the search panel.

This panel is display only.

Navigation Path: [TPL] – [HIPP Case Search] - [(Enter search criteria)] - [(Click on [Search])]

6.47.2 HIPP Case Search Results Panel Layout



6.47.3 HIPP Case Search Results Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Birth Date	The date of birth of the recipient (Current ID).	Field	Date (MM/DD/CCYY)	8
Current ID	Unique identifier for the recipient.	Field	Alphanumeric	12
Elig Effective Date	The effective date for the recipient (Current ID).	Field	Date (MM/DD/CCYY)	8
Elig End Date	The end date for the recipient (Current ID).	Field	Date (MM/DD/CCYY)	8
HIPP Ctrl No	The HIPP control number assigned to the HIPP case.	Field	Number (Integer)	9
Prem Effective Date	Premium Effective Date.	Field	Date (MM/DD/CCYY)	8
Prem End Date	Premium End Date.	Field	Date (MM/DD/CCYY)	8
Prem Freq	The frequency of the premium being paid.	Field	Character	1
Policy Number	The policy number associated to the HIPP case.	Field	Character	30
Program	The program the recipient is enrolled in.	Field	Alphanumeric	50
Recip. TPL	Indicates whether the Recipient has TPL. Valid values are "Yes" and "No".	Field	Character	3
Recipient Name	The name of the recipient. Format Last Name, First Name Middle Initial.	Field	Alphanumeric	31

Field	Description	Field Type	Data Type	Length
TPL Term Date	The end date for the TPL.	Field	Date (MM/DD/CCYY)	8

6.47.4 HIPP Case Search Results Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.47.5 HIPP Case Search Results Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.47.6 HIPP Case Search Results Panel Accessibility

6.47.6.1 To Access the HIPP Case Search Results Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria.	
4	Click **Search**.	HIPP Case Search results display.

6.48 HIPP Control Number Search Panel Overview

6.48.1 HIPP Control Number Search Panel Narrative

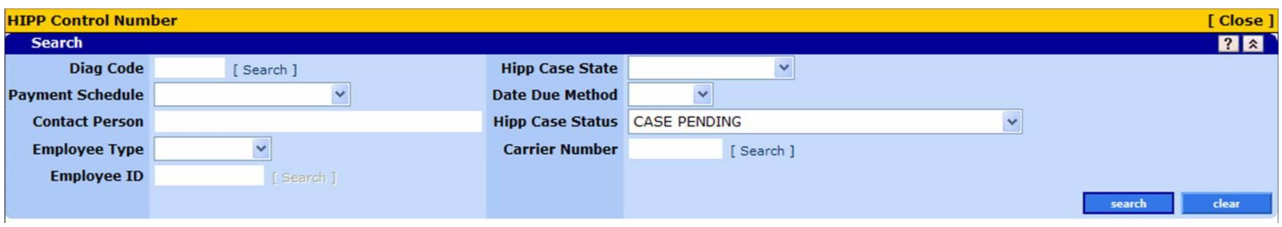
The Agency uses the HIPP Control Number Search panel to determine HIPP Control Number for HIPP Case Search panel.

The available search criteria on the panel include: Diag Code; HIPP Case State; Payment Schedule; Date Due Method; Contact Person; HIPP Case Status; Employee Code; Employee ID; Carrier Number.

This panel is inquiry only.

Navigation Path: [TPL] - [HIPP Case Search] - [HIPP Control Number search link]

6.48.2 HIPP Control Number Search Panel Layout



6.48.3 HIPP Control Number Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Clear	Allows the user to remove search information from the panel.	Button	N/A	0
Carrier Number	This indicates carrier number.	Field	Alphanumeric	10
Contact Person	The name of the insurance carrier's person to contact concerning HIPP premium payments.	Field	Character	40
Date Due Method	Indicates whether the HIPP payments should be manually or systematically generated.	Field	Character	1
Diag Code	The actual high cost diagnosis code.	Field	Alphanumeric	7
Employee ID	This indicates the ID of the employee. This ID can be a policyholder ID or recipient ID.	Field	Number(Integer)	9
Employee Type	This indicates the type of the employee. This type can be a policyholder or recipient.	Field	Drop Down List Box	12
Hipp Case State	Indicates whether to purchase or not to purchase the HIPP policy.	Field	Character	1
Hipp Case Status	The code that identifies why a policy was or was not purchased.	Field	Character	2

Field	Description	Field Type	Data Type	Length
Payment Schedule	Identifies when (monthly, quarterly, etc.) the HIPP policy must be paid.	Field	Character	1
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0

6.48.4 HIPP Control Number Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Carrier Number	Button	1	Carrier Number must be numeric.	Enter numeric value in Carrier Number field.
Diag Code	Button	1	Diag Code must be numeric.	Enter numeric value in Diag Code field.

6.48.5 HIPP Control Number Search Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.48.6 HIPP Control Number Search Panel Accessibility

6.48.6.1 To Access the HIPP Control Number Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Click **HIPP Control Number** Search link.	HIPP Control Number search panel displays.

6.49 HIPP Case Mini Search Panel Overview

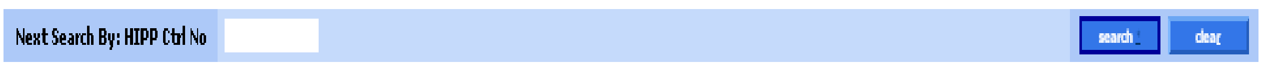
6.49.1 HIPP Case Mini Search Panel Narrative

TPL HIPP Case Mini Search panel allows the user to enter search criteria and query for HIPP Case records whose data matches that criteria.

This panel is inquiry only.

Navigation Path: [TPL] – [HIPP Case Search] - [(Enter search criteria and click on [Search])] - [(Select row from search results)]

6.49.2 HIPP Case Mini Search Panel Layout



6.49.3 HIPP Case Mini Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Clear	Clear the search information.	Button	N/A	0
HIPP Ctrl No	Unique identifier for the recipient.	Field	Alphanumeric	12
Search	Search for a HIPP Case.	Button	N/A	0

6.49.4 HIPP Case Mini Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.49.5 HIPP Case Mini Search Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.49.6 HIPP Case Mini Search Panel Accessibility

6.49.6.1 To Access the HIPP Case Mini Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Click **Add**.	HIPP Case Mini Search panel displays.

6.50 HIPP Case Maintenance Panel Overview

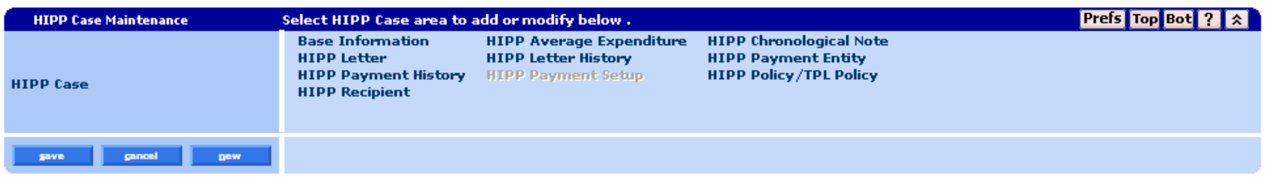
6.50.1 HIPP Case Maintenance Panel Narrative

The TPL HIPP Case Maintenance panel contains links to open other panels in the TPL HIPP Case Information panel.

This panel is inquiry only.

Navigation Path: [TPL] - [HIPP Case Search] - [(select row from search results)]

6.50.2 HIPP Case Maintenance Panel Layout



6.50.3 HIPP Case Maintenance Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Base Information	Link to the HIPP Base Information panel.	Hyperlink	N/A	0
Cancel	Cancel the changes on the HIPP Case panels.	Button	N/A	0
HIPP Average Expenditure	Link to the HIPP Average Expenditure panel.	Hyperlink	N/A	0
HIPP Chronological Note	Link to the HIPP Chronological Note panel.	Hyperlink	N/A	0
HIPP Letter	Link to the HIPP Letter panel.	Hyperlink	N/A	0
HIPP Letter History	Link to the HIPP Letter History panel.	Hyperlink	N/A	0
HIPP Payment Entity	Link to the HIPP Payment Entity panel.	Hyperlink	N/A	0
HIPP Payment History	Link to the HIPP Payment History panel.	Hyperlink	N/A	0
HIPP Payment Setup	Link to the HIPP Payment Setup panel.	Hyperlink	N/A	0
HIPP Policy/TPL Policy	Link to the HPP Policy/TPL Policy panel.	Hyperlink	N/A	0
HIPP Recipient	Link to the HIPP Recipient panel	Hyperlink	N/A	0
Save	Save the HIPP Case panels.	Button	N/A	0

6.50.4 HIPP Case Maintenance Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.50.5 HIPP Case Maintenance Panel Extra Features

The HIPP Payment Set-up Panel link is only enabled when the following has occurred:

- At least 1 recipient has been added to the case

- At least 1 coverage has been selected

- A payment entity has been added to the case

- All required data on the HIPP Base Information Panel has been added

- The Update Expenditure button has been selected and the data saved

- HIPP case status has been changed to 'ES' (Case in a Premium Payment Status)

6.50.6 HIPP Case Maintenance Panel Accessibility

6.50.6.1 To Access the HIPP Case Maintenance Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to from search results.	HIPP Case Maintenance panel displays.

6.51 HIPP Information Panel Overview

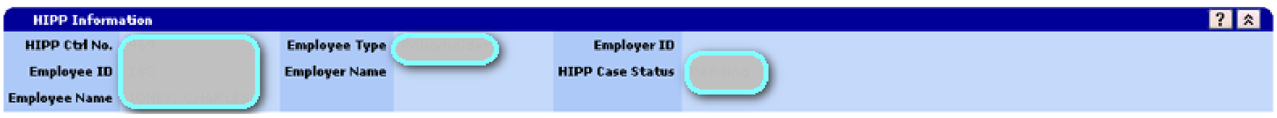
6.51.1 HIPP Information Panel Narrative

The HIPP Information panel shows high level HIPP information for the HIPP case that the user has selected.

This panel is display only.

Navigation Path: [TPL] – [HIPP Case Search] - [Search] - [Select a row from search result] OR [TPL] – [Search] - [Add] - [TPL Information] - [HIPP Case] OR [TPL - HIPP Search] - [Add]

6.51.2 HIPP Information Panel Layout



6.51.3 HIPP Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Employee Name	This is the employee's last name, first name and middle initial.	Field	Character	29
Employee Type	The type of employee.	Field	Character	12
Employee ID	The number assigned to the employee.	Field	Number (Integer)	9
Employer ID	This is a unique, user-defined employer identification number used on all screens and reports to identify the employer.	Field	Character	9
Employer Name	This is the business name of the employer.	Field	Character	39
HIPP Case Status	This is the status of the HIPP Case.	Field	Character	40
HIPP Ctrl No.	The HIPP control number assigned to the HIPP case.	Field	Number (Integer)	9

6.51.4 HIPP Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.51.5 HIPP Information Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.51.6 HIPP Information Panel Accessibility

6.51.6.1 To Access the HIPP Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to view details.	HIPP Information panel displays.

6.52 HIPP Base Information Panel Overview

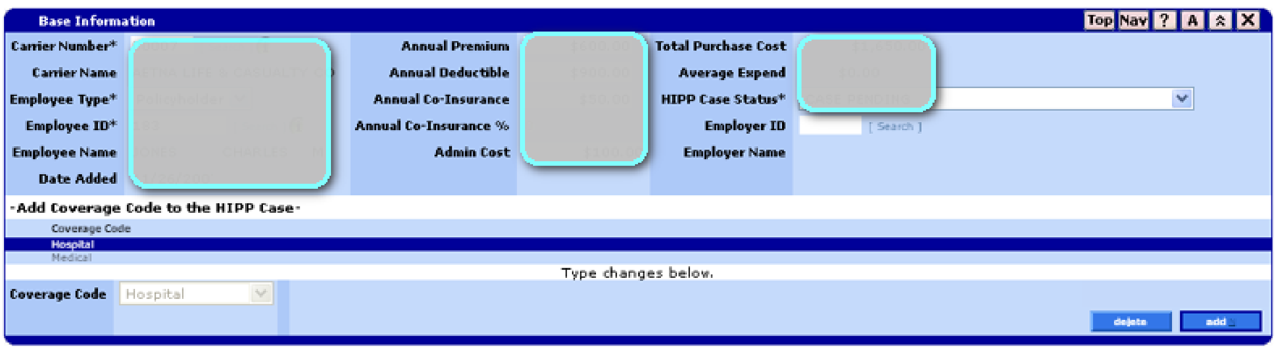
6.52.1 HIPP Base Information Panel Narrative

The HIPP Case Base Information panel is used to access and calculate the recipient's insurance policy payment benefits.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [HIPP Case Search] - [Enter Search Criteria] - [(select row from search results)] - [Base Information]

6.52.2 HIPP Base Information Panel Layout



6.52.3 HIPP Base Information Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	This allows the user to add coverage groupings to the HIPP case.	Button	N/A	0
Admin Cost	Standard dollar amount of administering this network per member.	Field	Number (Decimal)	10
Annual Co-Insurance	Annual co-insurance dollar amount for the policy.	Field	Number (Decimal)	9
Annual Co-Insurance %	Annual co-insurance percentage for the policy.	Field	Number (Decimal)	3
Annual Deductible	The amount that Medicaid must meet before the insurance carrier pays for services rendered.	Field	Number (Decimal)	9
Annual Premium	Dollar amount of the premium on an annual basis.	Field	Number (Decimal)	9
Average Expend	Average dollar amount of claims paid for the member in that aid category by sex and age (and possibly diagnosis) found	Field	Number (Decimal)	9

Field	Description	Field Type	Data Type	Length
	on the HIPP Average Expenditures window.			
Carrier Name	Name used to identify a specific Carrier.	Field	Character	28
Carrier Number	Number used to identify a specific Carrier.	Field	Character	7
Coverage Code	The coverage group that is covered under the policy. The dropdown list contains the following possible values: - 01 - Hospital - 02 - Medical - 03 - Dental - 04 - Vision - 05 - Pharmacy - 06 - Long Term Care.	Combo Box	Drop Down List Box	0
Date Added	The date the policy was identified as a HIPP resource.	Field	Date (MM/DD/CCYY)	8
Delete	Allows a user to remove a record from the data list	Button	N/A	0
Employee ID [Search]	The identification used to uniquely identify the policyholder internally to the system and is also used on all screens and reports as Policyholder ID.	Hyperlink	N/A	0
Employee Name	The policyholder's first and last name.	Field	Character	28
Employee Type	The type of employee.	Combo Box	Drop Down List Box	0
Employer ID [Search]	Allows the user to search for an Employer ID.	Hyperlink	N/A	0
Employer Name	The business name of an employer.	Field	Character	39
HIPP Case Status	Indicates whether to purchase or not to purchase the HIPP policy.	Combo Box	Drop Down List Box	0
Total Purchase Cost	System calculated cost to purchase the policy annually. This is calculated by adding the following fields: Annual Premium Amount, Annual Deductible Amount, Annual Co-Insurance Amount and the Admin Cost.	Field	Number (Decimal)	9

6.52.4 HIPP Base Information Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Add	Button	1	A valid Recipient ID is required.	Verify recipient ID is valid. Re-enter.
Admin Cost	Field	1	Enter a valid value.	The Admin Cost is a numeric only value.

Field	Field Type	Error Code	Error Message	To Correct
Annual Co-Insurance	Field	1	Enter a valid value.	The Annual Co-Insurance is a numeric only value.
	Field	2	Annual Co-Insurance must be less than or equal to 999999.99.	Correct Annual Co-Insurance amount.
Annual Deductible	Field	1	Enter a valid value.	The Annual Deductible is a numeric only value.
	Field	2	Annual Deductible must be less than or equal to 999999.99.	Correct Annual Deductible amount.
Annual Premium	Field	1	Enter a valid value.	The Annual Premium is a numeric only value.
	Field	2	Annual Premium must be less than or equal to 999999.99.	Correct Annual Premium amount.
Carrier Number	Field	1	Carrier Number must be numeric.	Please re-enter a valid value.
	Field	2	A valid Carrier Number is required.	Enter a valid Carrier Number.
Coverage Code	Field	1	A valid Coverage Code must be selected.	Select a valid coverage code.
Employee ID	Field	2	A valid Employee ID is required.	Enter a valid Employee ID.
	Field	3	Employee ID must be numeric.	Please enter a valid value.
Employer ID	Field	1	Employer ID is not valid. Please re-enter a valid value.	Please re-enter a valid value.
HIPP Case Status	Field	1	Carrier Number, Average Exp greater than zero, and HIPP Recipient(s) are required. Also, a HIPP Payment Entity must be created before attempting to change the HIPP Case Status to Premium Payment. Add required fields and create a HIPP Payment Entity, save record and try changing the HIPP Case Status again.	Add Required fields and create a HIPP Payment Entity, save record and try changing the HIPP Case Status again.
	Field	2	Warning: Update HIPP end dates to reflect eligibility change.	Verify if recipient’s eligibility is current.

Field	Field Type	Error Code	Error Message	To Correct
Total Purchase Cost	Field	1	Total Purchase Amount must be less than or equal to 99999.99.	Verify Total Purchase amount.

6.52.5 HIPP Base Information Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.52.6 HIPP Base Information Panel Accessibility

6.52.6.1 To Access the HIPP Base Information Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to view details.	HIPP Case Information panel displays.
6	Click Base Information.	HIPP Base Information panel displays.

6.52.6.2 To Add on the HIPP Base Information Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Carrier Number. If unknown, click on [Search] button to locate by Carrier Type, Carrier Name, Re-Bill Frequency, Pin Number, Active Indicator or Electronic Billing ID.	
3	Select **Employee Type** from drop down list box.	
4	Enter Employee ID. If unknown, click [Search] to locate by Policyholder ID, Last Name, First Name, SSN, Birth Date, Phone Number, Fax Number, or Phone Number Extension.	Employee Name automatically prefills based on information entered.
5	Enter Annual Premium.	
6	Enter Annual Deductible.	

Step	Action	Response
7	Enter Annual Co-Insurance.	
8	Enter Admin Cost.	
9	Select **HIPP Case Status** from drop down list box.	
11	Enter Employer ID.	
12	Add **Coverage Code** to the HIPP Case by selecting row	
13	Click **Save**.	HIPP Base Information is saved.

6.52.6.3 To Add Coverage on the HIPP Base Information Panel

Step	Action	Response
1	Click **Add**.	
2	Select **Coverage Code** from drop down list box.	Coverage Code information is saved.

6.52.6.4 To Update the HIPP Base Information Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPP Base Information is saved.

6.52.6.5 To Delete on the HIPP Base Information Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.53 HIPP Average Expenditure Panel Overview

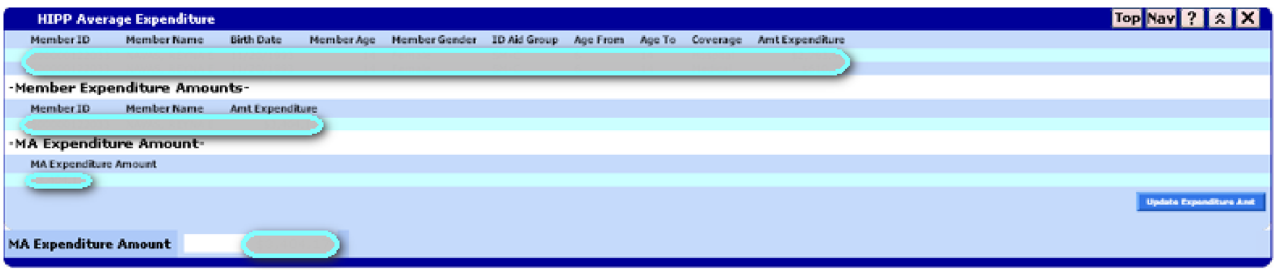
6.53.1 HIPP Average Expenditure Panel Narrative

The Agency uses the HIPP Average Expenditure Panel to calculate the average Medicaid expenditure amount for a case to determine if it is cost effective to pay the premium.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [HIPP Search] - [HIPP Case] - [HIPP Average Expenditure]

6.53.2 HIPP Average Expenditure Panel Layout



6.53.3 HIPP Average Expenditure Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Age From	This is the start of the recipient's age range.	Field	Number (Integer)	4
Age To	This is the end of the recipient's age range.	Field	Number (Integer)	4
Amt Expenditure	The average claim paid amount for the recipient's age, sex, and aid category.	Field	Number (Decimal)	9
Birth Date	The is the date of birth of the recipient.	Field	Date (MM/DD/CCYY)	8
Coverage	The type of coverage group.	Field	Character	14
ID Aid Group	This is the Aid Group of the recipient.	Field	Character	4
MA Expenditure Amount	The average claim paid amount of all recipients included in the HIPP case for their age, sex, and aid category.	Field	Number (Decimal)	9
Member Age	This is the age of the recipient.	Field	Number (Integer)	9
Member Gender	This is the gender of the recipient.	Field	Character	1
Member ID	The recipient's unique identifier.	Field	Character	12
Member Name	This is the name of the recipient.	Field	Character	30

Field	Description	Field Type	Data Type	Length
Update Expenditure Amt	This button allows the user to update the expenditure amounts. If the expenditure amount on the HIPP Base Information panel is zero, the user must select this button and save the record for the expenditures to be updated on the HIPP case.	Button	N/A	0

6.53.4 HIPP Average Expenditure Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.53.5 HIPP Average Expenditure Panel Extra Features

In order for the expenditure amount to be updated on the t_hipp_resource table, the user must select the Update Expenditure button and save.

6.53.6 HIPP Average Expenditure Panel Accessibility

6.53.6.1 To Access the HIPP Average Expenditure Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search.**	HIPP Case Search panel displays.
3	Click **Add**. Users may also access this panel by selecting an existing case from the HIPP Case Search results panel.	HIPP Case Maintenance panel displays.
4	Click **HIPP Expenditure** hyperlink.	HIPP Avg Expenditure panel displays.

6.54 HIPP Chronological Note Panel Overview

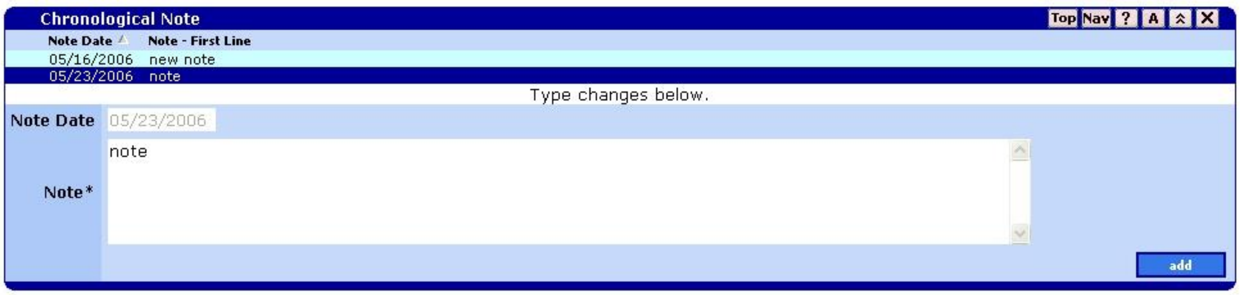
6.54.1 HIPP Chronological Note Panel Narrative

The HIPP Chronological Note panel is used to write information concerning the HIPP Policy.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [HIPP Search] - [HIPP Case] - [HIPP Chronological Note]

6.54.2 HIPP Chronological Note Panel Layout



6.54.3 HIPP Chronological Note Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the HPP Chronologial Note panel.	Button	N/A	0
Note	The note in its entirety.	Field	Character	500
Note Date	The date on which the notes were typed.	Field	Date (MM/DD/CCYY)	10
Note - First Line	This is a listing of the first line of each note that was typed.	Listview	Character	50

6.54.4 HIPP Chronological Note Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Note	Field	0	At least one line is required for the note. Enter the first line of the note.	Enter the first line of the note.

6.54.5 HIPP Chronological Note Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.54.6 HIPP Chronological Note Panel Accessibility

6.54.6.1 To Access HIPP Chronological Note Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to view details.	HIPP Case Information panel displays.
6	Click HIPP Chronological Note.	HIPP Chronological Note panel displays.

6.54.6.2 To Add on the HIPP Chronological Note Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Note**.	
3	Click **Save**.	HIPP Chronological Note panel information is saved.

6.55 HIPP Letter Panel Overview

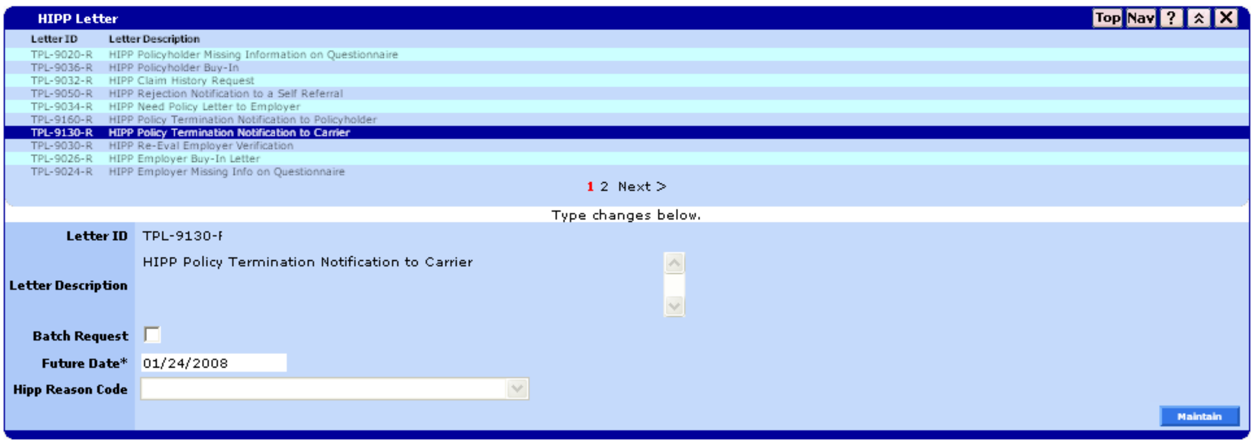
6.55.1 HIPP Letter Panel Narrative

The HIPP Letter panel allows the user to request a HIPP letter to send.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [HIPP Case Search] [(enter search criteria and click on Search)] - [(select row from search results)] [HIPP Case Maintenance] - [HIPP Case] - [HIPP Letter]

6.55.2 HIPP Letter Panel Layout



6.55.3 HIPP Letter Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Letter Description	The description of the letter.	Field	Character	1000
Letter ID	The identifier of the letter.	Field	Character	10
Maintain	Allows the user to manually request a letter.	Button	N/A	0
HIPP Reason Code	The reason for denying the HIPP case.	Combo Box	Drop Down List Box	0
Future Date	The date the batch letter request should be sent.	Field	Date (MM/DD/CCYY)	8
Batch Request	This is selected when the user would like to save the letter as a batch request.	Combo Box	Checkbox	0

6.55.4 HIPP Letter Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.55.5 HIPP Letter Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.55.6 HIPP Letter Panel Accessibility

6.55.6.1 To Access the HIPP Letter Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to from search results.	HIPP Case Maintenance panel displays.
6	Click HIPP Letter.	HIPP Letter panel displays.

6.55.6.2 To Maintain on the HIPP Letter Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click Maintain.	Login window displays.
3	Enter User Name and Password.	
4	Click **OK**.	Letter generator opens with a message requesting the user to select: To open the PDF Save the PDF Cancel

6.56 HIPP Letter History Panel Overview

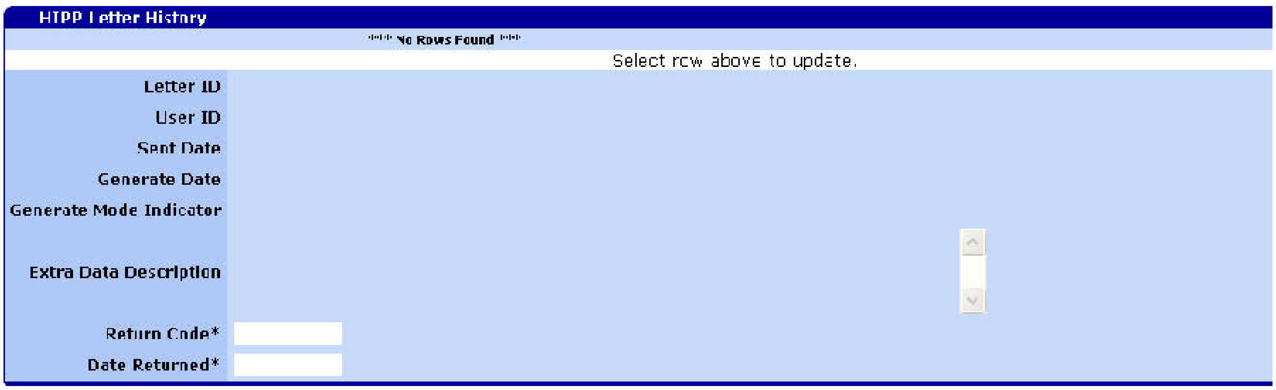
6.56.1 HIPP Letter History Panel Narrative

The HIPP Letter History shows all the letters sent out for this HIPP Policy.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [HIPP Case Search] - [(enter search criteria and click on Search)] - [(select row from Search Results)] - [HIPP Case Maintenance] - [HIPP Case] - [HIPP Letter History]

6.56.2 HIPP Letter History Panel Layout



6.56.3 HIPP Letter History Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Date Returned	The date the response was received.	Field	Date (MM/DD/CCYY)	8
Extra Data Description	This field identifies any extra data that was requested for the letter.	Field	Character	4000
Generate Date	The date the letter was requested.	Field	Date (MM/DD/CCYY)	8
Generate Mode Indicator	The method used to produce the letter, (batch or online).	Field	Character	1
Letter ID	The identifier of the letter.	Field	Character	9
Return Code	This is a code to indicate whether a response has been received.	Combo Box	Drop Down List Box	0
Sent Date	The date the letter was created and printed.	Field	Date (MM/DD/CCYY)	8
User ID	The user identification number that requested the letter.	Field	Character	8

6.56.4 HIPP Letter History Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Date Returned	Field	1	Return Date should be less than or equal to 12/31/2299.	Enter a date of return less than or equal to 12/31/2299.
	Field	2	Return Date should be greater than or equal to 01/01/1900.	Enter a date of return greater than or equal to 01/01/1900.
	Field	3	Return Date should not be prior to Sent Date or Generate Date.	Enter a date of return greater than or equal to Sent Date and Generate Date.
	Field	4	Return Date not valid.	Enter valid return date.

6.56.5 HIPP Letter History Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.56.6 HIPP Letter History Panel Accessibility

6.56.6.1 To Access the HIPP Letter History Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to from search results.	HIPP Case Maintenance panel displays.
6	Click HIPP Letter History.	HIPP Letter History panel displays.

6.56.6.2 To Update the HIPP Letter History Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPP Letter History information is saved.

6.57 HIPP Payment Entity Panel Overview

6.57.1 HIPP Payment Entity Panel Narrative

The HIPP Payment Entity panel contains the payee information for the HIPP Case. There is not a Delete button, because this panel is a continuation of the Base Information panel.

This panel is display only.

Navigation Path: [TPL] – [HIPP Case Search] - [(Enter search criteria)] - [(Select row from search results)] - [HIPP Case Maintenance] - [HIPP Case] - [Payment Entity]

6.57.2 HIPP Payment Entity Panel Layout

6.57.3 HIPP Payment Entity Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Address 1	The street address where the contact person is located.	Field	Character	30
Address 2	The street second address where the contact person is located.	Field	Character	30
City	The city where the contact person is located.	Field	Character	18
Fax	Fax Number of the contact person associated with the HIPP Payment Entity.	Field	Character	15
FEIN	Tax ID of entity.	Field	Character	9
HIPP Identifier [Search]	The Payee Type radio button determines what value (Policyholder ID - number - 9, Employee ID - character - 7, Carrier Number - character - 7, Current ID - character - 12) is entered.	Hyperlink	N/A	0
Name	The name of the person for the HIPP identifier field.	Field	Character	40
Payee Type	The identification number assigned to the HIPP Policy. The valid radio button values are: Carrier and Employer.	Combo Box	Radio Button	0
Payment Media	This identifies the type of media to use for payment.	Combo Box	Drop Down List Box	0

Field	Description	Field Type	Data Type	Length
Phone	Phone number of the person to contact regarding this premium payment.	Field	Character	10
[Search]	This link allows for a more detailed search of a HIPP Identifier.	Hyperlink	N/A	0
State	The state where the contact person is located.	Combo Box	Drop Down List Box	0
Zip	The nine digits of the contact person's zip code.	Field	Character	9
Zip Code [4]	This lists the last 4 digits of the Zip Code.	Field	Number (Integer)	4

6.57.4 HIPP Payment Entity Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
HIPP Identifier	Field	1	HIPP Indentifier [value will display] is an invalid Carrier.	Enter a valid Carrier.
	Field	2200	HIPP Identifier [value will display] is an invalid Employer.	Enter a vaild Employer.

6.57.5 HIPP Payment Entity Panel Extra Features

The policyholder and recipient obtains have been disabled. Only a carrier or employer can be set-up as a payment entity.

6.57.6 HIPP Payment Entity Panel Accessibility

6.57.6.1 To Access the HIPP Payment Entity Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to from search results.	HIPP Case Maintenance panel displays.
6	Click HIPP Payment Entity.	HIPP Payment Entity panel displays.

6.57.6.2 To Update on the HIPP Payment Entity Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPP Payment Entity information is saved.

6.58 HIPP Payment History Panel Overview

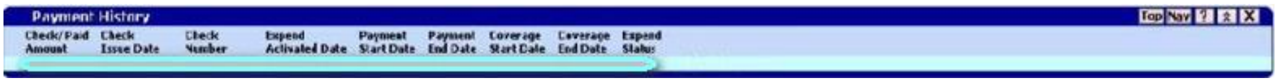
6.58.1 HIPP Payment History Panel Narrative

The HIPP Payment History panel shows the payment history for the HIPP Case.

This panel is display only.

Navigation Path: [TPL] - [HIPP Case] - [HIPP Case Search] - [search] - [(select row from search results)] - [HIPP Maintenance [HIPP Payment History]]

6.58.2 HIPP Payment History Panel Layout



6.58.3 HIPP Payment History Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.58.4 HIPP Payment History Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Check / Paid Amount	The amount of the check issued. Format 999999999.99.	Field	Number (Decimal)	11
Check Issue Date	The date the check was issued.	Field	Date (MM/DD/CCYY)	8
Check Number	The number of the check issued.	Field	Number (Integer)	9
Coverage End Date	The last date of coverage. This field will not be used in the AMMIS and will always be 0.	Field	Date (MM/DD/CCYY)	8
Coverage Start Date	The start date of coverage. This is not used in the AMMIS and will always contain 0.	Field	Date (MM/DD/CCYY)	8
Expend Activated Date	The date the expenditure was activated.	Field	Date (MM/DD/CCYY)	8
Expend Status	The status of the expenditure. Valid values are ‘Y ‘(processed) and ‘N’ (not processed).	Field	Character	1
Payment End Date	The end date of the payment.	Field	Date (MM/DD/CCYY)	8
Payment Start Date	The begin date for the payment.	Field	Date (MM/DD/CCYY)	8

6.58.5 HIPP Payment History Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.58.6 HIPP Payment History Panel Accessibility

6.58.6.1 To Access the HIPP Payment History Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to from search results.	HIPP Case Maintenance panel displays.
6	Click HIPP Payment History.	HIPP Payment History panel displays.

6.59 HIPP Payment Setup Panel Overview

6.59.1 HIPP Payment Setup Panel Narrative

The HIPP Payment Setup displays payment information for the HIPP Case. There is not a Delete button, because this panel is a continuation of the Base Information panel.

This panel is display only.

Navigation Path: [TPL] – [HIPP Case Search] - [(Enter search criteria and click on [Search])] - [(Select row from search results)] - [HIPP Case Maintenance] - [HIPP Case] - [Payment Setup]

6.59.2 HIPP Payment Setup Panel Layout

6.59.3 HIPP Payment Setup Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Date Due	The date that the next premium payment for the policy is due.	Field	Date (MM/DD/CCYY)	8
Date Due Method	The method by which payment is made.	Combo Box	Drop Down List Box	0
HIPP Review Date	The next date when the policy should be reviewed.	Field	Date (MM/DD/CCYY)	8
Last Paid Date	The most recent date that a premium payment was issued for the policy.	Field	Date (MM/DD/CCYY)	8
Payment Schedule	Identifies when (monthly, quarterly, etc.) the HIPP policy must be paid.	Combo Box	Drop Down List Box	0
Premium Check Amt	Amount to send to the carrier, policyholder, or employer.	Field	Number (Decimal)	9
Premium End Date	If the method equals Manual, the premium begin and end dates are the period covered by the check. If the method equals System, the premium begin and end dates are on-going dates that should cover the entire period the case is active.	Field	Date (MM/DD/CCYY)	8
Premium Start Date	If the method equals Manual, the premium begin and end dates are the period covered by the check. If the method equals System,	Field	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
	the premium begin and end dates are on-going dates that should cover the entire period the case is active.			
Refund Amount	The amount expected to be received as a result of over-payment.	Field	Number (Decimal)	9

6.59.4 HIPP Payment Setup Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Date Due	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter the date in a valid format.
	Field	2	Enter a valid Due Date. MM/DD/CCYY.	Enter valid Due Date.
HIPP Review Date	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter the date in a valid format.
	Field	2	Enter a valid HIPP Review Date. Format is MM/DD/CCYY.	HIPP review date must equal current date or greater.
Premium Check Amt	Field	1	Enter a valid value.	The Premium Check Amt is a numeric only value.
Premium End Date	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter a date in a valid format.
Premium Start Date	Field	1	Invalid date. Format is MM/DD/CCYY.	Enter the date in a valid format.
Refund Amount	Field	1	Enter a valid value.	Refund Amount is a numeric only value.
Payment Schedule	Combo Box	1	Payment Schedule is required.	Select Payment Schedule.

6.59.5 HIPP Payment Setup Panel Extra Features

The user can set-up a payment as a manual or system request. If the user selects Manual, a record is inserted into the t_hipp_expend_xref using sak_expenditure = -1 and will be processed in the next weekly HIPP cycle.

If the user updates a payment record and there is already a row on the t_hipp_expend_xref with a sak_expenditure = -1, the record is updated with any changes to the premium dates.

If the user updates a payment record and there is not a row on the t_hipp_expend_xref with a sak_expenditure = -1, a new record is inserted and will be processed in the next weekly HIPP cycle.

If the user updates the Method by changing from Manual to System and a row already exists on the t_hipp_expend_xref table with a sak_expenditure = -1, an error message is displayed. This operation will not be allowed until the Manual request is processed.

If the user updates the Method by changing from Manual to System and there is no row on the table with a sak_expenditure = -1, the save will be allowed but no rows are inserted into the table. The batch program will process all System requested payments.

6.59.6 HIPP Payment Setup Panel Accessibility

6.59.6.1 To Access the HIPP Payment Setup Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to from search results.	HIPP Case Maintenance panel displays.
6	Click HIPP Payment Setup.	HIPP Payment Setup panel displays.

6.60 HIPP Policy/TPL Policy Panel Overview

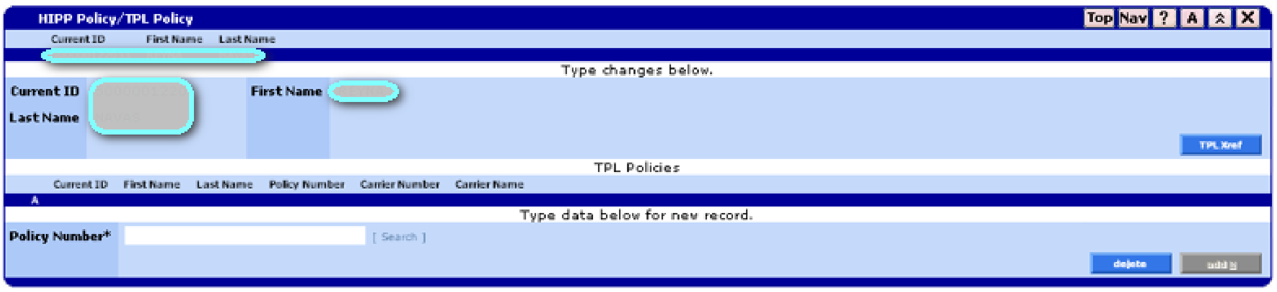
6.60.1 HIPP Policy/TPL Policy Panel Narrative

The HIPP Policy/TPL Policy panel supports the display of existing policy associations, as well as the removal of associations, to existing TPL Policies with a HIPP Case.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation: [TPL]-[HIPP Case Search]-[HIPP Maintenance]-[HIPP Policy/TPL Policy]

6.60.2 HIPP Policy/TPL Policy Panel Layout



6.60.3 HIPP Policy/TPL Policy Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	This button allows the user to associate a TPL policy with a recipient on the HIPP case.	Button	N/A	0
Carrier Name	This field describe about business Name.	Field	Character	45
Carrier Number	The unique identifier for the carrier.	Field	Character	7
Clear	This button clear's the fields.	Button	N/A	0
Current ID	Unique identifier for the recipient.	Field	Number	12
Delete	This button allows the user to disassociate a TPL policy with the recipient on the HIPP case.	Button	N/A	0
First Name	This is the first name of the recipient on the TPL Policy.	Field	Alphanumeric	15
Last Name	This is the last name of the recipient on the TPL Policy.	Field	Alphanumeric	15
Policy Number	The number associated with the policy.	Field	Character	30
TPL Xref	The button opens the HIPP Policy Xref Panel so the user can associate the recipient to a specific policy.	Button	N/A	0

6.60.4 HIPP Policy/TPL Policy Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
TPL Policy	Hyperlink	1	A valid TPLResource is required.	Please search for the valid TPL Policy.

6.60.5 HIPP Policy/TPL Policy Panel Extra Features

When the user clicks the [Add] button, the system displays the pop-up panel 'Search - TPL Policies'. Refer to that panel for additional information on its' functionality.

To delete an association, the user will select the row from the list and click [Delete].

The Policy Number field is hyperlinked to display a pop-up panel to the TPL Information page.

6.60.6 HIPP Policy/TPL Policy Panel Accessibility

6.60.6.1 To Access the HIPP Policy/TPL Policy Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to from search results.	HIPP Case Maintenance panel displays.
6	Click HIPP Policy/TPL Policy.	HIPP Policy/TPL Policy panel displays.

6.60.6.2 To Update on the HIPP Policy/TPL Policy Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPP Payment Setup information is saved.

6.60.6.3 To Delete on the HIPP Policy/TPL Policy Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.61 HIPP Policy Xref Panel Overview

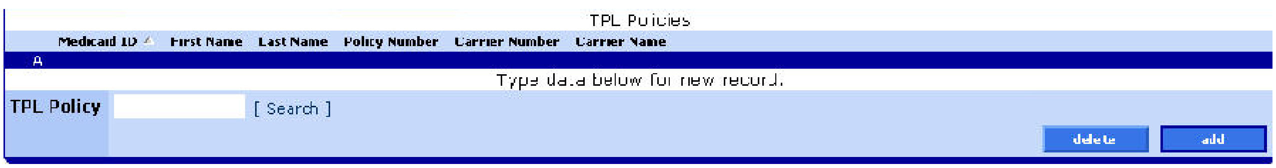
6.61.1 HIPP Policy Xref Panel Narrative

The HIPP Policy Xref panel is used to cross-reference the HIPP Policy to specific TPL Policies for the recipients on the HIPP Policy. This is needed to perform cost avoidance, and failure to set up records on this panel results in the HIPP Premium being delayed payment. .

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation: [TPL]-[HIPP Case Search]-[Enter Search Criteria] - [Search] - [Select Recipient from list] - [HIPP Policy/TPL Policy] – [TPL Xref]

6.61.2 HIPP Policy Xref Panel Layout



6.61.3 HIPP Policy Xref Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the HIPP Policy Xref panel.	Button	N/A	0
Carrier Name	This field describe about business name.	Field	Character	45
Carrier Number	This field describe about carrier code.	Field	Character	7
Delete	This button allows the user to disassociate a TPL policy with the recipient on the HIPP case.	Field	N/A	0
First Name	The first name of member.	Field	Character	15
Last Name	The last name of member.	Field	Character	20
Medicaid ID	Used for current identification number.	Field	Number	12
Policy Number	Policy Number Identifier.	Field	Character	16
[Search]	This link allows for a more detailed search for a TPL Policy.	Button	N/A	0
TPL Policy	This allows to search for TPL Policy.	Hyperlink	N/A	0

6.61.4 HIPP Policy Xref Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
TPL Policy	Hyperlink	1	A valid TPL Resource is required.	Please search for the valid TPL Policy.

6.61.5 HIPP Policy Xref Panel Extra Features

When the user clicks the [Add] button, the system displays the pop-up panel 'Search - TPL Policies'. Refer to that panel for additional information on its' functionality.

To delete an association, the user selects the row from the list and click [Delete].

The Policy Number field is hyperlinked to display a pop-up panel to the TPL Information page.

6.61.6 HIPP Policy Xref Panel Accessibility

6.61.6.1 To Access the HIPP Policy Xref Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **HIPP Case Search.**	HIPP Case Search panel displays.
3	Click **Add**.	HIPP Case Maintenance panel displays.
4	Click HIPP Policy/TPL Policy hyperlink.	HIPP Policy/TPL Policy panel displays.
5	Click **TPL Xref** button.	TPL Policies information displays below HIPP Policy information.

6.61.6.2 To Update on the HIPP Policy Xref Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPP Payment Setup information is saved.

6.61.6.3 To Delete on the HIPP Policy Xref Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.62 HIPP Recipient Panel Overview

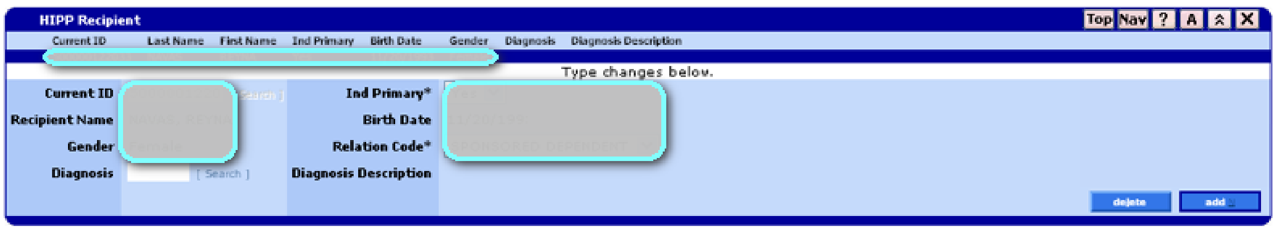
6.62.1 HIPP Recipient Panel Narrative

This panel displays information for each recipient within a HIPP Case.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [HIPP Case Search] - [(Enter search criteria and click on [Search])] - [(Select row from search results)] - [HIPP Case Maintenance] - [HIPP Case] - [HIPP Recipient]

6.62.2 HIPP Recipient Panel Layout



6.62.3 HIPP Recipient Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a recipient to the HIPP Case.	Button	N/A	0
Birth Date	This lists the Birth Date for the Current ID.	Field	Date (MM/DD/CCYY)	8
Current ID [Search]	This allows the user to search for a Current ID.	Hyperlink	N/A	0
Delete	Delete a recipient associated with the HIPP Case.	Button	N/A	0
Diagnosis [Search]	A code for the condition requiring medical attention.	Hyperlink	N/A	0
Diagnosis Description	The nomenclature for a medical condition.	Field	Character	25
Gender	The recipient's gender code.	Field	Character	1
Ind Primary	Indicates if the recipient is the primary on the HIPP Policy.	Combo Box	Drop Down List Box	0
Recipient Name	The first and last name for the Current ID.	Field	Character	35
Relation Code	This lists the Relation Code.	Combo Box	Drop Down List Box	0

6.62.4 HIPP Recipient Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Relation Code	Combo Box	1	A valid relation code is required.	Please select a Relationship from the drop down list.
Current ID	Field	1	Recipient is a duplicate.	Verify the Current ID and re-enter.
	Field	2	A valid current ID is required.	Please enter a Recipient ID.
	Field	3	Warning: Update HIPP end dates to reflect eligibility change.	This error message appears when the user clicks save and the recipient is not eligible for today's date. This error is for a existing HIPP Case (i.e. not a new HIPP Case). Verify the recipient and the HIPP Case start and end date.
	Field	5	One or more recipients are not valid. Please verif	A recipient is required, open the "Recipient" panel and add a recipient that is eligible for today's date.
	Field	6	Recipient [ID will display] currently not eligible.	Add recipient who is currently eligible.
	Field	7	Recipient [ID will display] is not enrolled in a valid Health Program for HIPP.	Verify recipient enrolled in valid program. Enter correct recipient information.
	Field	8	Current ID must be numeric.	Enter numeric values only.
Ind Primary	Field	1	Primary Ind is required.	Please select a Ind Primary from the drop down list.

6.62.5 HIPP Recipient Panel Extra Features

Linking Recipient IDs

If the user enters a current ID, the panel determines if the ID entered is active. If not, the panel will save the information under the linked active ID.

If the Recipient subsystem receives a link request and the old sak_recip exists on the t_hipp_recip table, the sak_recip is updated in batch to the active sak_recip.

6.62.6 HIPP Recipient Panel Accessibility

6.62.6.1 To Access the HIPP Recipient Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.

2	Point to **TPL** and click **HIPP Case Search**.	HIPP Case Search panel displays.
3	Enter Search Criteria into fields. Note: You must enter information into at least one search field.	
4	Click **Search**.	Search results display.
5	Select row to from search results.	HIPP Case Maintenance panel displays.
6	Click HIPP Recipient.	HIPP Recipient panel displays.

6.62.6.2 To Add on the HIPP Recipient Panel

Step	Action	Response
1	Enter Current ID. If unknown click [Search].	Recipient Name automatically prefills based on information entered.
2	Enter Diagnosis.	Diagnosis Decription automatically prefills based on information entered.
3	Select **Ind Primary** from the drop down list box.	
8	Select **Relation Code** from the drop down list box.	
9	Click **Save**.	HIPP Recipient information is saved.

6.62.6.3 To Update on the HIPP Recipient Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPP Recipient information is saved.

6.62.6.4 To Delete on the HIPP Recipient Panel

Step	Action	Response
1	Click line item to be deleted	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.63 Search - CCN Panel Overview

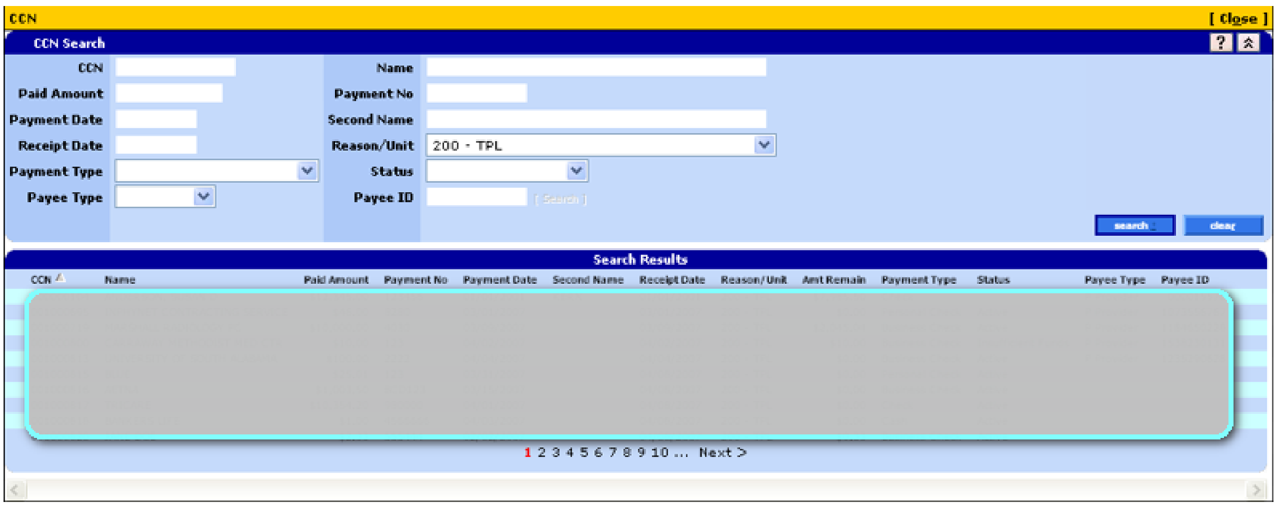
6.63.1 Search - CCN Panel Narrative

The CCN panel is used to search for TPL cash control numbers and return the selected CCN to the prior panel.

This panel is inquiry only.

Navigation Path: [TPL] – [AR Search] - (Click on [Search] next to [CCN])

6.63.2 Search - CCN Panel Layout



6.63.3 Search - CCN Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Amt Remain	This is the amount remaining on the check available for disposition.	Field	Number (Decimal)	9
CCN	This is the Cash Control Number.	Field	Number (Integer)	10
Check	The check number from the cash receipt.	Field	Character	13
Clear	Used to clear the search fields.	Button	N/A	0
Name	This is the name of the person that sent the cash receipt.	Field	Character	20
Paid Amount	The amount of the cash receipt.	Field	Number (Decimal)	9
Payee ID [Search]	The payee identification number that uniquely identifies the payee	Hyperlink	N/A	0

Field	Description	Field Type	Data Type	Length
Payee Type	The type of payee.	Combo Box	Drop Down List Box	0
Payment Date	The check date.	Field	Date (MM/DD/CCYY)	8
Payment No.	The check number.	Field	Number (Integer)	10
Payment Type	The form of payment (check, money order, etc.)	Combo Box	Drop Down List Box	0
Reason/Unit	This is the unit number.	Combo Box	Drop Down List Box	0
Receipt Date	The date the cash was receipted.	Field	Date (MM/DD/CCYY)	8
Records	Allows the user to select the number of search items to display per page.	Field	Checkbox	0
Search	Initiates a search based on the criteria entered in the search fields.	Button	N/A	0
Second Name	The second name associated with the cash receipt.	Field	Character	20
Status	The current status of the cash receipt.	Combo Box	Drop Down List Box	0

6.63.4 Search - CCN Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.63.5 Search - CCN Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.63.6 Search - CCN Panel Accessibility

6.63.6.1 To Access the Search - CCN Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search.**	AR Search panel displays.
3	Click **[Search]** located to the right of the CCN field.	CCN Search panel displays.

6.63.6.2 To Navigate the Search - CCN Panel

Step	Action	Response
1	Enter information into fields.	
2	Click on **Search**.	CCN number populates on panel.

6.64 Search - Carrier Number Panel Overview

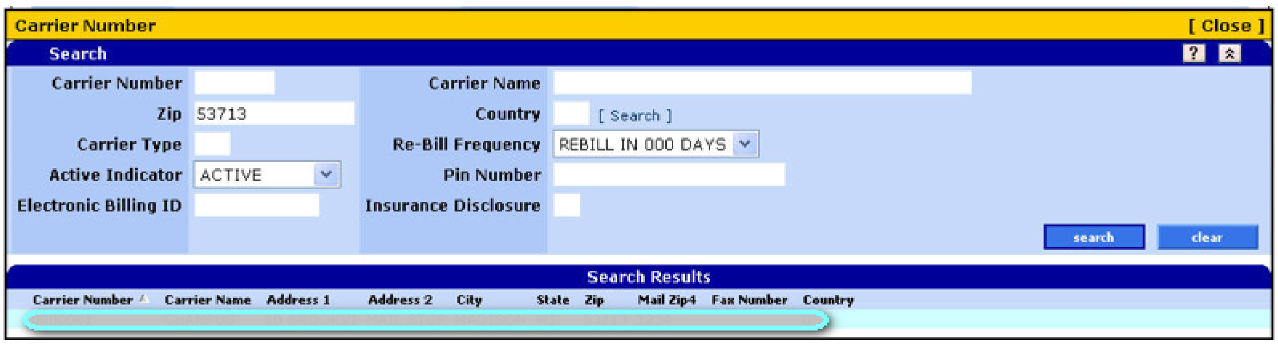
6.64.1 Search - Carrier Number Panel Narrative

The Carrier panel is used to search for carriers and return the results to the prior panel. This information is currently housed on the TT - TPL Carrier Mnemonic Inquiry screen in the legacy system.

This panel is inquiry only.

Navigation: [TPL] – [Search] - [(Click on [Add])] - [Base Information] - [(Click on [Search] next to Carrier Number)]

6.64.2 Search - Carrier Number Panel Layout



6.64.3 Search - Carrier Number Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Active Indicator	Indicates if the carrier is active or inactive.	Listview	Drop Down List Box	0
Address 1	This lists Address 1 of the carrier.	Field	Character	10
Address 2	This lists Address 2 of the carrier.	Field	Character	10
Carrier Name	This lists the name of the carrier.	Field	Alphanumeric	50
Carrier Number	Allows a user to search by the Carrier Number.	Field	Character	0
Carrier Type	This is the code, which identifies the type of carrier.	Field	Character	1
City	This lists the city of the carrier	Field	Character	7
Clear	Clears the information within the search fields.	Button	N/A	0
Country	Two character country abbreviation.	Field	Character	2
Electronic Billing ID	This is the electronic billing identification for the carrier.	Field	Number (Integer)	9

Field	Description	Field Type	Data Type	Length
Fax Number	The carrier's fax number.	Field	Number (Integer)	10
Insurance Disclosure	The insurance disclosure code.	Field	Character	1
Mail Zip 4	This lists the 4 digit zip code extension.	Field	Number (Integer)	4
Pin Number	This is the pin number for the carrier's electronic billing.	Field	Number (Integer)	22
Re-Bill Frequency	This is the carrier billing frequency, in days.	Listview	Drop Down List Box	0
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0
State	This lists the state of the carrier.	Field	Character	2
Zip	This lists the zip code of the carrier.	Field	Character	5

6.64.4 Search - Carrier Number Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.64.5 Search - Carrier Number Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.64.6 Search - Carrier Number Panel Accessibility

6.64.6.1 To Access the Search-Carrier Number Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Click **Add**.	TPL Maintenance panel displays.
4	Select TPL Base Information hyperlink.	TPL Base Information panel displays.
5	Click **[Search]** located to the right of Carrier Number.	Carrier Number search panel displays.

6.64.6.2 To Navigate on the Search-Carrier Number Panel

Step	Action	Response
1	Enter Carrier Number, Carrier Name or Zip.	
2	Click **Search**. Users may also select from the list of Search Results (if available) displayed at the bottom by clicking on a row.	Carrier Number and Carrier Name are populated in fields.

6.65 Search - Employer Panel Overview

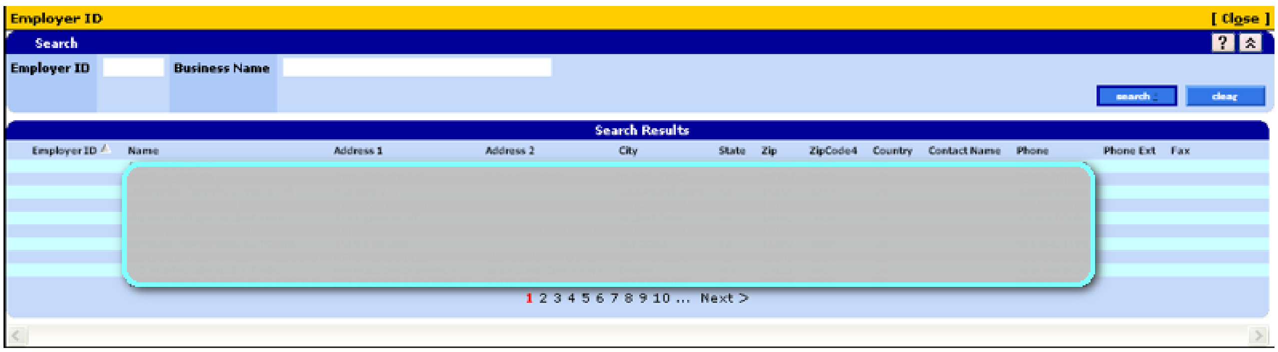
6.65.1 Search - Employer Panel Narrative

The Employer panel allows the user to search for employers and return the results to the prior panel.

This panel is inquiry only.

Navigation: [TPL] – [Search] - [(Click on [Add])] - [Base Information] - [(Click on [Search] next to Employer ID)]

6.65.2 Search - Employer Panel Layout



6.65.3 Search - Employer Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Address 1	The address of the employer.	Field	Character	20
Address 2	The second address line for the employer.	Field	Character	20
Business Name	The business name of an employer.	Field	Character	39
City	The city of the employer.	Field	Character	20
Clear	Allows the user to remove employer information from the search fields	Button	N/A	0
Contact Name	The name of the employer's contact.	Field	Character	39
Country	The country code in which the employer resides.			
Employer ID	This field is the unique, user-defined employer identification used on all screens and reports to identify the employer.	Field	Number (Integer)	7
Fax	The employers fax number.	Field	Character	10
Phone	The employers phone number	Field	Number (Integer)	10
Phone Ext	The employers phone extension number.	Field	Number (Integer)	5

Field	Description	Field Type	Data Type	Length
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0
State	The employers state code.	Field	Character	2
Zip	The zip code of the employer.	Field	Number (Integer)	5
ZipCode4	The last 4 digits of the employers zip code.	Field	Number (Integer)	4

6.65.4 Search - Employer Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.65.5 Search - Employer Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.65.6 Search - Employer Panel Accessibility

6.65.6.1 To Access the Search - Employer Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search.**	TPL Search panel displays.
3	Click **Add**.	TPL Maintenance panel displays.
4	Select TPL Base Information hyperlink.	TPL Base Information panel displays.
5	Click on **[Search]** located to the right of the **Employer ID** field.	Employer ID Search panel displays.

6.65.6.2 To Navigate the Search - Employer Panel

Step	Action	Response
1	Enter **Employer ID** or **Business Name** or select from the list of results displayed at the bottom of panel.	
2	Click on **Search**.	Employer ID and Employer Name information populates.

6.66 Search - HIPAA Adjustment Reason Panel Overview

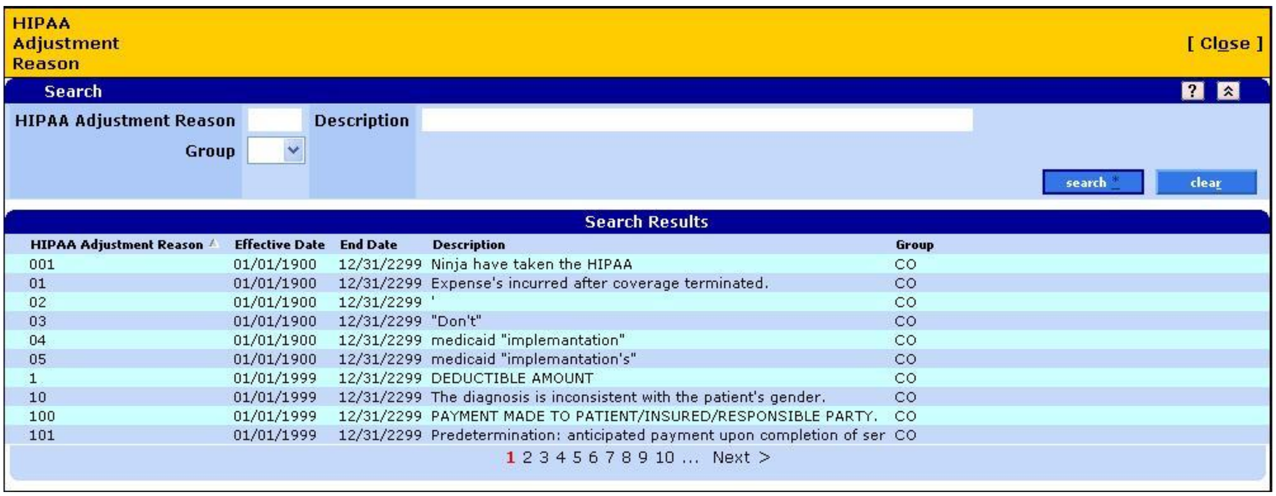
6.66.1 Search - HIPAA Adjustment Reason Panel Narrative

The HIPAA Adjustment Reason panel allows the user to search for and associate the HIPAA Adjustment reason code.

This panel is inquiry only.

Navigation: [TPL] - [Related Data]-[Xref]-[Local/HIPAA Adjustment Reason]-[Add]-[(Click on [Search] next to HIPAA Adjustment Reason)]

6.66.2 Search - HIPAA Adjustment Reason Panel Layout



6.66.3 Search - HIPAA Adjustment Reason Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Clear	Allows the user to remove search criteria entered.	Button	N/A	0
Description	The text description of the Health Insurance Portability and Accountability Act (HIPAA) adjustment reason code.	Field	Character	300
Effective Date	The effective date of the HIPAA Adjustment reason, the date the HIPAA Adjustment Reason code becomes valid for use in the system.	Field	Date (MM/DD/CCYY)	10
End Date	The End Date for the HIPAA Adjustment Reason, the last date the HIPAA Adjustment Reason code is valid for use in the system.	Field	Date (MM/DD/CCYY)	10

Field	Description	Field Type	Data Type	Length
Group	The code identifying the general category of the payment adjustment.	Field	Character	2
HIPAA Adjustment Reason	The HIPAA compliant Adjustment Reason code. HIPAA requires that every "adjustment" to the allowed price of a claim that causes it to differ from the amount originally billed on the claim should be accounted for. As a result, all cutbacks/denials of units and dollars need to be captured and mapped to HIPAA specific adjustment reason codes and remarks codes.	Field	Character	2
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0

6.66.4 Search - HIPAA Adjustment Reason Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.66.5 Search - HIPAA Adjustment Reason Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.66.6 Search - HIPAA Adjustment Reason Panel Accessibility

6.66.6.1 To Access the Search - HIPAA Adjustment Reason Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click **Xref**.	Xref-Related Data panel displays.
4	Select the Local/HIPAA Adjustment Reason hyperlink.	Local/HIPAA Adjustment Reason panel displays.
5	Click **Add**.	Activates fields for entry of data or selection from lists.
6	Click HIPAA Adjustment Reason [Search].	HIPAA Adjustment Reason panel displays.

6.66.6.2 To Navigate on the Search - HIPAA Adjustment Reason Panel

Step	Action	Response
1	Enter HIPAA Adjustment Reason.	
2	Select **Group** from drop down list.	
3	Enter Description.	
4	Click **Search**. Users may also select from the list of Search Results displayed at the bottom by clicking on a row.	HIPAA Adjustment Reason information is displayed.

6.67 Search - HIPAA Service Type Panel Overview

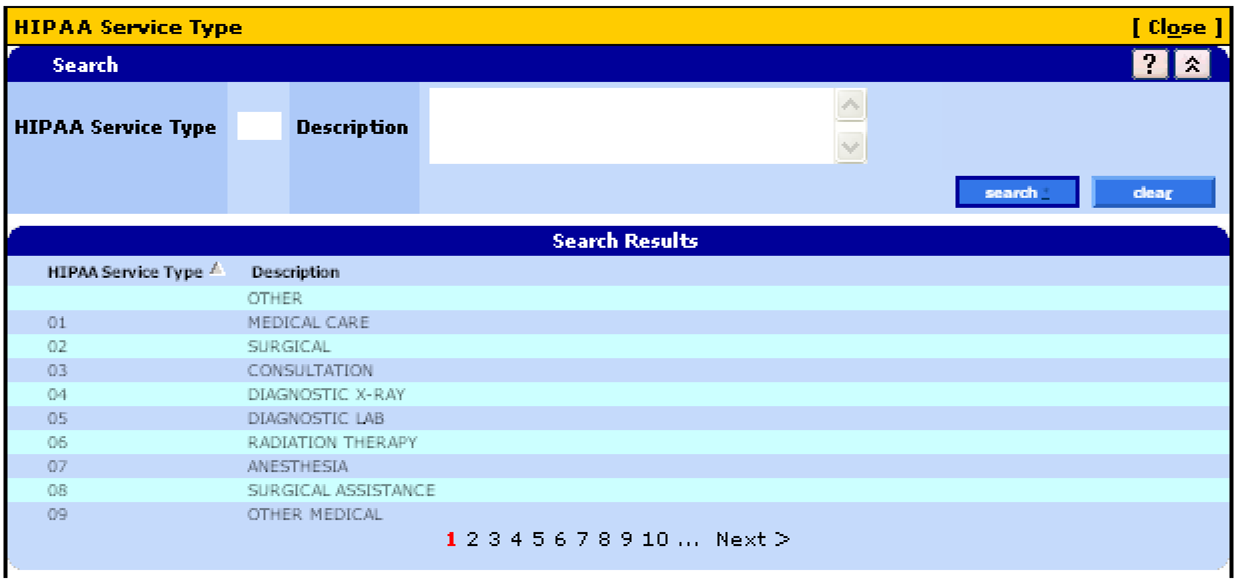
6.67.1 Search - HIPAA Service Type Panel Narrative

The HIPAA Service Type panel allows the user to search for and associate HIPAA Service Types to coverage codes.

This panel is inquiry only.

Navigation: [TPL]-[Related Data]-[Xref]-[HIPAA Service/Coverage Type]-[Add]-[(Click on [Search] next to HIPAA Service Type)]

6.67.2 Search - HIPAA Service Type Panel Layout



6.67.3 Search - HIPAA Service Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Clear	Allows a user to remove data entered into fields.	Button	N/A	0
Description	The HIPAA compliant description for the Service Type.	Field	Character	30
HIPAA Service Type	The HIPAA compliant code for a Service Type.	Field	Character	2
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0

6.67.4 Search - HIPAA Service Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.67.5 Search - HIPAA Service Type Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.67.6 Search - HIPAA Service Type Panel Accessibility

6.67.6.1 To Access the Search - HIPAA Service Type Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click **Xref**.	Xref-Related Data panel displays.
4	Select the HIPAA Service /Coverage Type hyperlink.	HIPAA Service/Coverage Type panel displays.
5	Click **Add**.	Activates fields for entry of data or selection from lists.
6	Click **[Search]** located to the right of HIPAA Service Type.	HIPAA Service Type panel displays.

6.67.6.2 To Navigate on the Search- HIPAA Service Type Panel

Step	Action	Response
1	Enter HIPAA Service Type.	
2	Enter Description.	
3	Click **Search**. Users may also select from the list of Search Results displayed at the bottom by clicking on a row.	HIPAA Service Type information is displayed.

6.68 Search - ICN Panel Overview

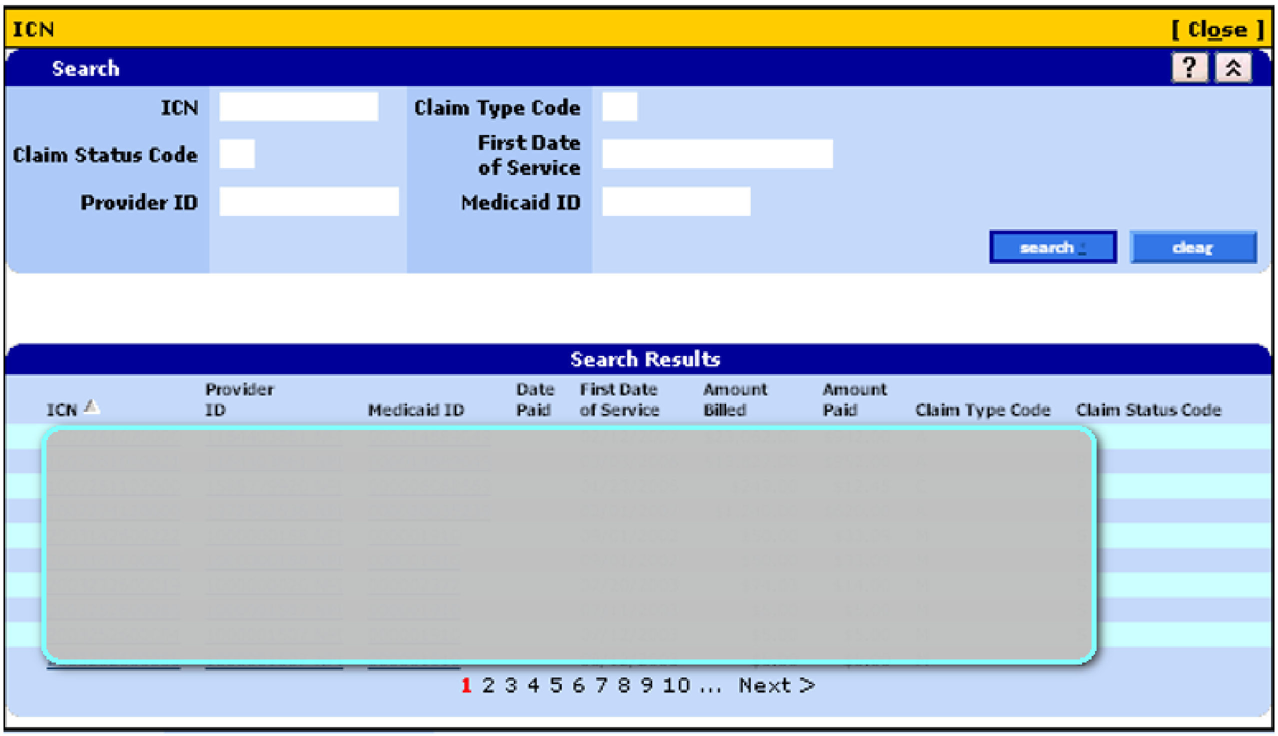
6.68.1 Search - ICN Panel Narrative

The ICN panel is used to search for internal control numbers (ICN)s and return the selected ICN to the prior panel.

This panel is inquiry only.

Navigation Path: [TPL] – [AR Search] – [(Click on [Add])] - [(Click on [Search] next to ICN)]

6.68.2 Search - ICN Panel Layout



6.68.3 Search - ICN Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Amount Billed	The amount the provider billed on the claim.	Label	Number (Integer)	0
Amount Paid	The amount paid on the claim.	Label	Number (Integer)	0
Claim Status Code	The status of the claim.	Field	Character	1
Claim Type Code	The type of claim.	Field	Character	1
Clear	Allows the user to remove data entered into search fields.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
Date Paid	The date Medicaid paid the claim to the provider.	Label	N/A	0
First Date of Service	The first date of service on the claim.	Field	Date (MM/DD/CCYY)	8
ICN	The internal control number assigned to a claim.	Field	Number (Integer)	13
Medicaid ID	The recipient's Medicaid number.	Field	Number (Integer)	12
Provider ID	The number assigned to the provider.	Field	Number (Integer)	15
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0

6.68.4 Search - ICN Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.68.5 Search - ICN Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.68.6 Search - ICN Panel Accessibility

6.68.6.1 To Access the Search - ICN Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Click **Add**.	Activates fields for entry of data or selection from lists.
4	Click **[Search]** located to the right of ICN.	ICN Search panel displays.

6.68.6.2 To Navigate on the Search - ICN Panel

Step	Action	Response
1	Enter **ICN**.	
2	Enter Claim Status Code.	
3	Enter Provider ID.	
4	Enter Claim Type Code.	
5	Enter First Date of Service.	
6	Enter Medicaid ID.	
7	Click **Search.** Users may also select from the list of Search Results displayed at the bottom by clicking on a row.	ICN Search information is displayed.

6.69 Search - Local Adjustment Reason Panel Overview

6.69.1 Search - Local Adjustment Reason Panel Narrative

The Local Adjustment Reason panel allows the user to search for and associate the Local Adjustment reason code.

This panel is inquiry only.

Navigation: [TPL] - [Related Data]-[Xref]-[Local/HIPAA Adjustment Reason]-[Add]-[(Click on [Search] next to Local Adjustment Reason)]

6.69.2 Search - Local Adjustment Reason Panel Layout

6.69.3 Search - Local Adjustment Reason Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Clear	Allows the user to remove data entered into search fields.	Button	N/A	0
Description	The description for the Adjustment Reason.	Field	Character	30
Reason Code	The Adjustment Reason assigned by the system, not the HIPAA adjustment reason.	Field	Character	2
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0

6.69.4 Search - Local Adjustment Reason Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.69.5 Search - Local Adjustment Reason Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.69.6 Search - Local Adjustment Reason Panel Accessibility

6.69.6.1 To Access the Search - Local Adjustment Reason Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click **Xref**.	Xref-Related Data panel displays.
4	Select the Local/HIPAA Adjustment Reason hyperlink.	Local/HIPAA Adjustment Reason panel displays.
5	Click **Add**.	Activates fields for entry of data or selection from lists.
6	Click **[Search]** located to the right of Local Adjustment Reason.	Local Adjustment Reason search panel displays.

6.69.6.2 To Navigate on the Search - Local Adjustment Reason Panel

Step	Action	Response
1	Enter Reason Code.	
2	Enter Description.	
3	Click **Search**. Users may also select from the list of Search Results displayed at the bottom by clicking on a row.	Local Adjustment Reason search information is displayed.

6.70 Search - Policy Number Panel Overview

6.70.1 Search - Policy Number Panel Narrative

The Policy Number panel is used to search for Policy Number and return the selected Policy Number to the prior panel.

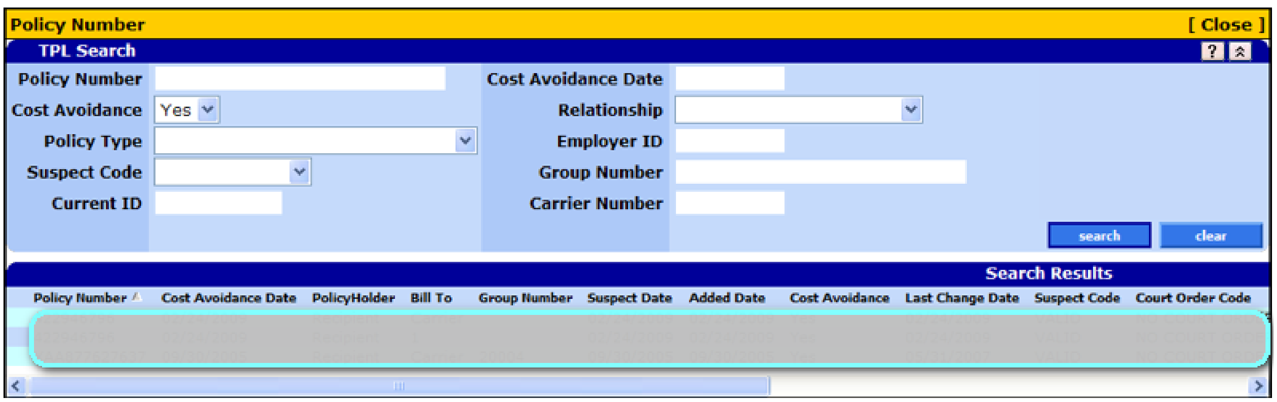
This panel is inquiry only.

Navigation Path: [TPL] – [AR Search] - (Click on [Search] next to [Policy Number])

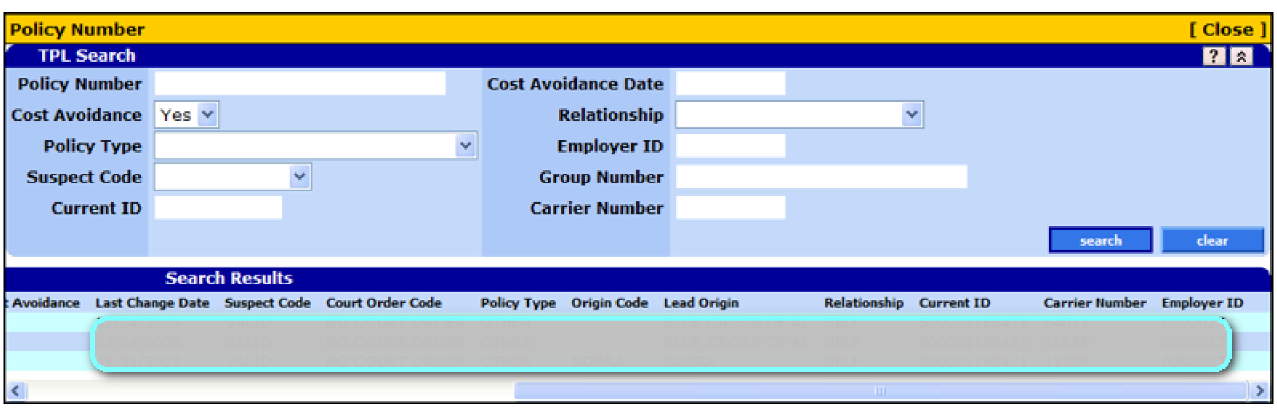
6.70.2 Search - Policy Number Panel Layout

The two layouts show all the Search Results of same panel.

Part 1



Part 2



6.70.3 Search - Policy Number Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Added Date	The date the resource was originally added to the system.	Field	Date (MM/DD/CCYY)	8
Bill To	This code describes who the TPL claim facsimiles are billed to: the employer of the policyholder or the carrier.	Field	Character	1
Carrier Number	System assigned insurance carrier identification number.	Field	Number (Integer)	9
Clear	Allows the user to remove data entered into search fields.	Button	N/A	0
Cost Avoidance	Indicates if this is to bypass cost avoidance or not.	Combo Box	Character	1
Cost Avoidance Date	This is the date the cost avoidance indicator was last updated.	Field	Date (MM/DD/CCYY)	8
Court Order Code	This code is used to identify the court ordered code, indicating if a TPL Resource is required via a legal decision.	Field	Character	1
Current ID	Medicare identification number.	Field	Number (Integer)	9
Employer ID	Non-unique, user-defined employer identification used on all screens and reports to identify the employer.	Field	Number (Integer)	9
Group Number	Policy group number. If present, gives the group number of the policy.	Field	Character	16
Last Change Date	Contains the date that this record was last changed to help support audit trail research.	Field	Date (MM/DD/CCYY)	8
Lead Origin	Description of where the lead originated.	Field	Character	1
Origin Code	Code assigned to a specific origin.	Field	Character	1
Policy Number	Policy number for this TPL policy.	Field	Number (Integer)	16
Policy Type	This code identifies the type of insurance policy that the recipient is covered under.	Combo Box	Character	1
Policyholder	This code identifies whether the policy owner is a Recipient or a Policyholder.	Field	Character	1
Policyholder ID	A unique number assigned to a policyholder.	Field	Character	9
Relationship	This code identifies the relationship of the policyholder to the recipient covered by a TPL policy.	Field	Character	1

Field	Description	Field Type	Data Type	Length
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0
Suspect Code	This field identifies the TPL suspect code which identifies whether a TPL resource is suspect and, if so, how it was determined to be suspect.	Combo Box	Character	1
Suspect Date	The last date the suspect code was changed on the policy record.	Field	Date (MM/DD/CCYY)	8
TPL Absent Parent	Indicator of Absent Parent.	Field	Number (Integer)	9
TPLHIPPXref Data	The sak_tpl_resource that is associated with the HIPP case.	Field	Character	9

6.70.4 Search - Policy Number Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.70.5 Search - Policy Number Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.70.6 Search - Policy Number Panel Accessibility

6.70.6.1 To Access the Search- Policy Number Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Click **[Search]** located to the right of Policy Number.	Policy Number Search panel displays.

6.70.6.2 To Navigate on the Search- Policy Number Panel

Step	Action	Response
1	Enter information in selected fields. Users may also select from the list of Search Results displayed at the bottom by clicking on a row.	
2	Click **Search**.	Policy Number information is displayed in field.

6.71 Search - Recipient Panel Overview

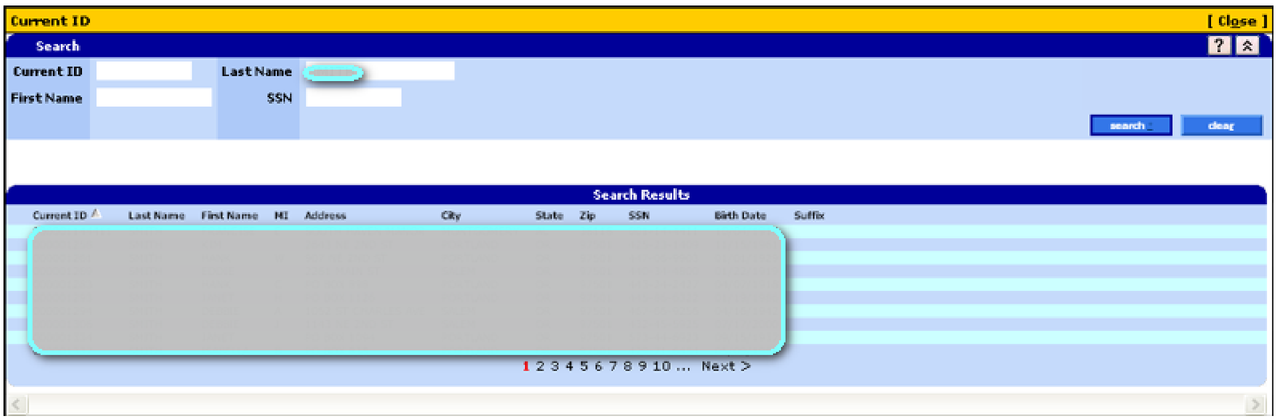
6.71.1 Search - Recipient Panel Narrative

The Recipient panel allows the user to access from a prior panel and search capability to return a needed record to the calling panel.

This panel is inquiry only.

Navigation: [TPL] – [AR Search] - [(Click on [Search] next to [Current ID])]

6.71.2 Search - Recipient Panel Layout



6.71.3 Search - Recipient Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Address	This lists the address of the recipient.	Field	Alphanumeric	25
Birth Date	This lists the birth date of the recipient.	Field	Date (MM/DD/CCYY)	8
City	This lists the city the recipient resides.	Field	Character	25
Clear	Allows the user to remove data entered on the panel.	Button	N/A	0
Current ID	The recipient's Medicaid identification number.	Field	Character	12
First Name	First name of recipient.	Field	Character	15
Last Name	Last name of recipient.	Field	Character	20
MI	This lists the middle initial of the recipient.	Field	Character	1
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0
SSN	Social Security Number of recipient.	Field	Number (Integer)	9

Field	Description	Field Type	Data Type	Length
State	This lists the state the recipient resides.	Field	Character	2
Suffix	This lists the Suffix of the recipient.	Field	Character	25
Zip	This lists the zip code of the recipient.	Field	Number (Integer)	5

6.71.4 Search - Recipient Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.71.5 Search - Recipient Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.71.6 Search - Recipient Panel Accessibility

6.71.6.1 To Access the Search - Recipient Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **AR Search**.	TPL AR Search panel displays.
3	Click **[Search]** located to the right of Current ID.	Recipient Search panel displays.

6.71.6.2 To Navigate on the Search - Recipient Panel

Step	Action	Response
1	Enter Current ID.	
2	Enter First Name.	
3	Enter Last Name.	
4	Enter **SSN**.	
5	Click **Search**. Users may also select from the list of Search Results displayed at the bottom by clicking on a row.	Recipient search information is displayed.

6.72 Search - Relationship Panel Overview

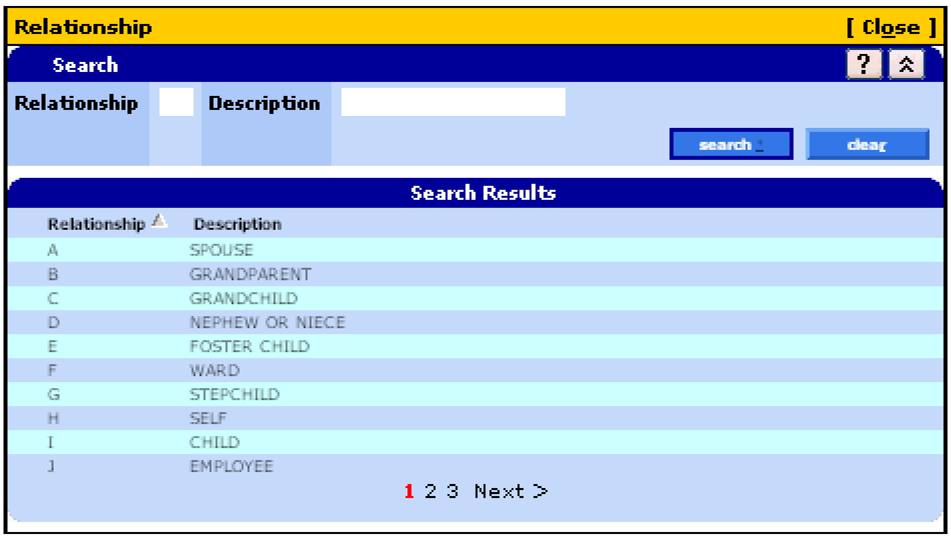
6.72.1 Search - Relationship Panel Narrative

The Relationship panel is used to search for relationship codes and return the results to the prior panel.

This panel is inquiry only.

Navigation: [TPL] – [Search] - [(Click on [Add])] - [Base Information] – [TPL] - [(Click on [Search] next to Relationship)]

6.72.2 Search - Relationship Panel Layout



6.72.3 Search - Relationship Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Clear	Allows the user to remove data entered on the panel.	Button	N/A	0
Description	This field contains the description associated with a specific relationship code.	Field	Character	20
Relationship	This code identifies the relationship of the policyholder to the recipient covered by a TPL policy.	Field	Character	1
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0

6.72.4 Search - Relationship Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.72.5 Search - Relationship Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.72.6 Search - Relationship Panel Accessibility

6.72.6.1 To Access the Search - Relationship Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Search**.	TPL Search panel displays.
3	Click **Add**.	TPL Maintenance panel is displayed.
4	Select TPL Base Information hyperlink.	TPL Base Information panel displays.
5	Click **[Search]** located to the right of Relationship.	Relationship Search panel displays.

6.72.6.2 To Navigate on the Search - Relationship Panel

Step	Action	Response
1	Enter Relationship.	
2	Enter Description.	
3	Click **Search**. Users may also select from the list of Search Results (if available) displayed at the bottom by clicking on a row.	Relationship search information is displayed.

6.73 Related Data Panel Overview

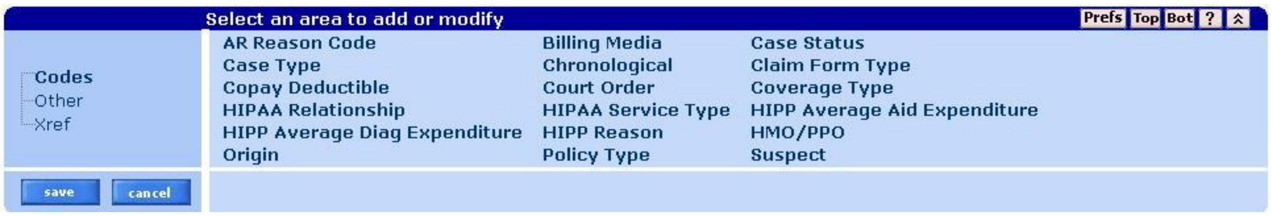
6.73.1 Related Data Panel Narrative

The point of access for the TPL Related Data panels.

This panel is inquiry only.

Navigation Path: [TPL] -[Related Data]

6.73.2 Related Data Panel Layout



6.73.3 Related Data Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Cancel	Allows the user to cancel any changes made to a panel.	Button	N/A	0
Codes	Link for Related Data Codes panels.	Hyperlink	N/A	0
Other	Link for Related Data Other panels.	Hyperlink	N/A	0
Save	Allows the user to save any changes made to a panel.	Button	N/A	0
Xref	Link for Related Data Xref panels.	Hyperlink	N/A	0

6.73.4 Related Data Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.73.5 Related Data Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.73.6 Related Data Panel Accessibility

6.73.6.1 To Access the Related Data Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.

6.73.6.2 To Navigate the Related Data Panel

Step	Action	Response
1	Select an area to view, add, or modify by clicking on a hyperlink.	Selected hyperlink displays associated panel.

6.74 Related Data - Codes Panel Overview

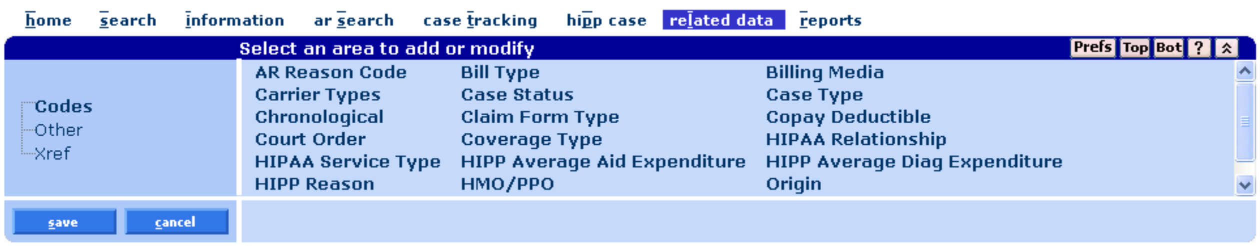
6.74.1 Related Data - Codes Panel Narrative

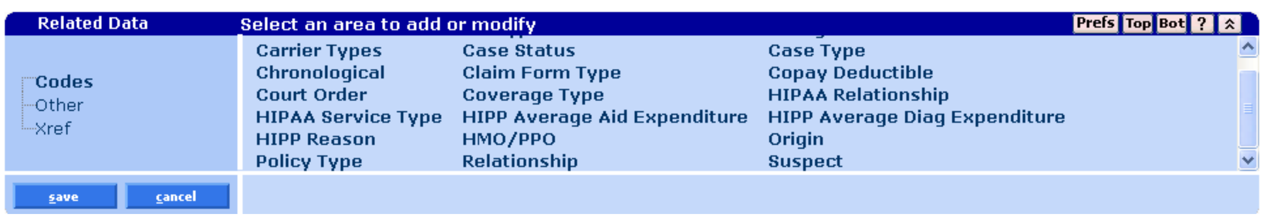
The point of access for the TPL Related Data Code panels.

This panel is inquiry onlyl.

Navigation Path: [TPL] – [Related Data] - [Codes]

6.74.2 Related Data - Codes Panel Layout





6.74.3 Related Data - Codes Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
AR Reason Code	Link to the AR Reason Code panel.	Hyperlink	N/A	0
Bill Type	Link to the Bill Type panel.	Hyperlink	N/A	0
Billing Media	Link to the Billing Media panel.	Hyperlink	N/A	0
Cancel	Allows the user to cancel any changes on the Codes panel.	Button	N/A	0
Carrier Types	Link to the Carrier Types panel.	Hyperlink	N/A	0
Case Status	Link to the Case Status panel.	Hyperlink	N/A	0
Case Type	Link to the Case Type panel.	Hyperlink	N/A	0
Chronological	Link to the Chronological panel.	Hyperlink	N/A	0
Claim Form Type	Link to the Claim Form Type panel.	Hyperlink	N/A	0
Copay Deductible	Link to the Copay Deductible panel.	Hyperlink	N/A	0

Field	Description	Field Type	Data Type	Length
Court Order	Link to the Court Order panel.	Hyperlink	N/A	0
Coverage Type	Link to the Coverage Type panel.	Hyperlink	N/A	0
HIPAA Relationship	Link to the HIPAA Relationship panel.	Hyperlink	N/A	0
HIPAA Service Type	Link to the HIPAA Service Type panel.	Hyperlink	N/A	0
HIPP Average Aid Expenditure	Link to the HIPP Average Aid Expenditure panel.	Hyperlink	N/A	0
HIPP Average Diag Expenditure	Link to the HIPP Average Diagnosis Expenditure panel.	Hyperlink	N/A	0
HIPP Reason	Link to the HIPP Reason panel.	Hyperlink	N/A	0
HMO/PPO	Link to the HMO/PPO panel.	Hyperlink	N/A	0
Origin	Link to the Origin panel.	Hyperlink	N/A	0
Policy Type	Link to the Policy Type panel.	Hyperlink	N/A	0
Relationship	Link to the Relationship panel.	Hyperlink	N/A	0
Save	Allows the user to save a record for codes.	Button	N/A	0
Suspect	Link to the Suspect panel.	Hyperlink	N/A	0

6.74.4 Related Data - Codes Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.74.5 Related Data - Codes Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.74.6 Related Data - Codes Panel Accessibility

6.74.6.1 To Access the Related Data-Codes Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.

6.75 Codes - AR Reason Code Panel Overview

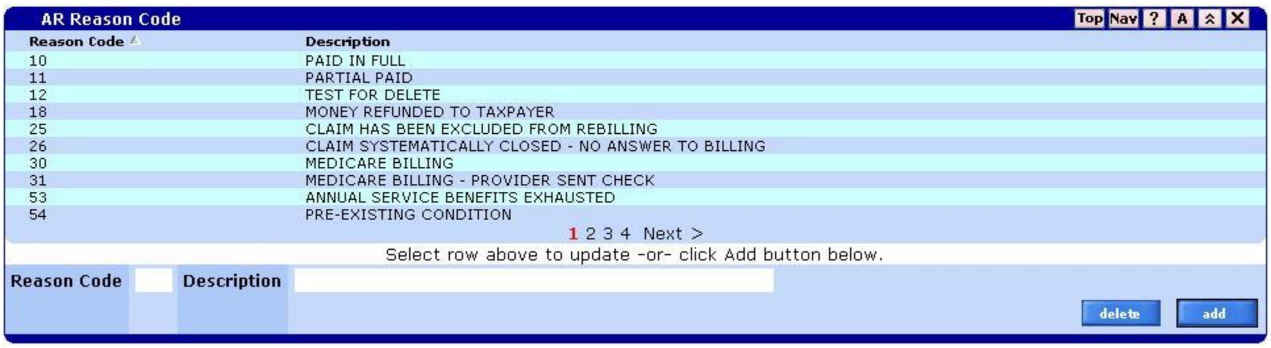
6.75.1 Codes - AR Reason Code Panel Narrative

The AR Reason Code panel is used to add, update, or delete the values and descriptions defined for A/R reasons.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation: [TPL] – [Related Data] - [Codes] - [AR Reason Code]

6.75.2 Codes - AR Reason Code Panel Layout



6.75.3 Codes - AR Reason Code Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows the user to add reason code information.	Button	N/A	0
Delete	Allows the user to remove reason code information.	Button	N/A	0
Description	Description for A/R Reason.	Field	Character	50
Reason Code	Code value for A/R Reason.	Field	Character	4

6.75.4 Codes - AR Reason Code Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Description	Field	1	Description is required.	Enter a Description.
Reason Code	Field	3	Cannot delete TPL A/R Reason record. In use by an AR Disposition.	Please select a different A/R Reason record.
	Field	4	Cannot delete A/R Reason record. In use by an AR.	Please select a different A/R Reason record.
	Field	5	Reason Code is required.	Enter a Reason Code.
	Field	6	Description is required.	Enter a Description.

Field	Field Type	Error Code	Error Message	To Correct
	Field	7	A duplicate record cannot be saved.	Enter a valid unique.

6.75.5 Codes - AR Reason Code Panel Extra Features

Referential integrity checks need to occur on the delete from this table against the following tables:
T_HIPAA_ADJRSN_XRF
T_TPL_AR_CAS_DISPS
T_TPL_AR_DISPS
T_TPL_AR_HEALTH

6.75.6 Codes - AR Reason Code Panel Accessibility

6.75.6.1 To Access the Codes - AR Reason Code Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select AR Reason Code.	AR Reason Code panel displays.

6.75.6.2 To Add on the Codes - AR Reason Code Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Reason Code.	
3	Enter Description.	
4	Click **Save**.	AR Reason Code information is saved.

6.75.6.3 To Update on the Codes - AR Reason Code Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	AR Reason Code information is saved.

6.75.6.4 To Delete on the Codes - AR Reason Code Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.76 Codes - Bill Type Panel Overview

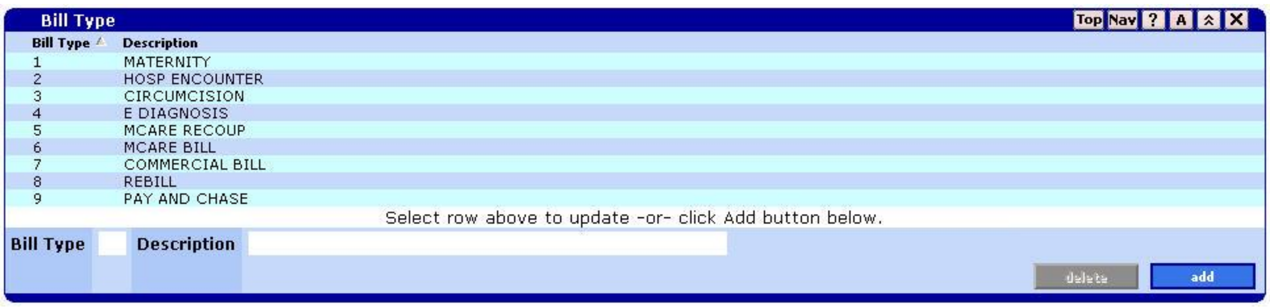
6.76.1 Codes - Bill Type Panel Narrative

The Bill Type panel establishes and maintains TPL types of billing.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Codes] - [Bill Type]

6.76.2 Codes - Bill Type Panel Layout



6.76.3 Codes - Bill Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Bill Type panel.	Button	N/A	0
Bill Type	This indicates the type of billing record.	Field	Character	1
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	This is the description of the billing type.	Field	Character	50

6.76.4 Codes - Bill Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Bill Type	Field	1	Bill Type is Required.	Please add a Billing Type.
Description	Field	1	Description is Required.	Please add a narrative Description for this billing type.

6.76.5 Codes - Bill Type Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.76.6 Codes - Bill Type Panel Accessibility

6.76.6.1 To Access the Codes - Bill Type Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Bill Type.	Bill Type panel displays.

6.76.6.2 To Add on the Codes - Bill Type Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Bill Type.	
3	Enter Description.	
4	Click **Save**.	Bill Type information is saved.

6.76.6.3 To Update on the Codes - Bill Type Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Bill Type information is saved.

6.76.6.4 To Delete on the Codes - Bill Type Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.77 Codes - Billing Media Panel Overview

6.77.1 Codes - Billing Media Panel Narrative

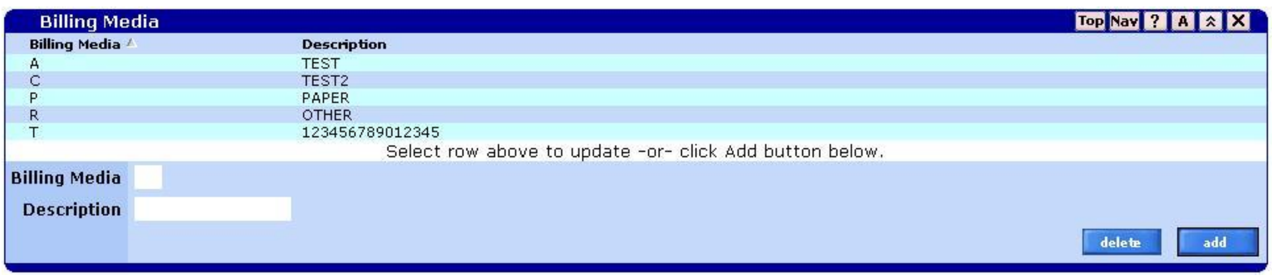
The Billing Media panel contains the possible values for the TPL billing media code and their descriptions. The data supplied by this panel is used by the Carrier panels to identify if billings should be sent as paper, electronic or none.

Delete operation now only allowed if relationship to t_tpl_carrier.cde_bill_media does not exist. If a join exists for the code, then the delete is prevented.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Billing Media]

6.77.2 Codes - Billing Media Panel Layout



6.77.3 Codes - Billing Media Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Billing Media panel.	Button	N/A	0
Billing Media	Code used to identify the billing media on which an employer or carrier wishes to receive TPL claim facsimiles.	Field	Character	1
Delete	Allows the user to remove a record from the panel.	Button	N/A	0
Description	Provides a detailed description of the associated billing media code.	Field	Character	15

6.77.4 Codes - Billing Media Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Billing Media	Field	1	Billing Media is Required.	Please add a Billing Media.
Delete	Button	1	Cannot delete Billing Media record. In use by Carrier.	Remove the Billing Media from all associated carrier records before deleting media type record.

Field	Field Type	Error Code	Error Message	To Correct
Description	Field	1	Description is Required.	Please add a narrative Description for this billing media.

6.77.5 Codes - Billing Media Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.77.6 Codes - Billing Media Panel Accessibility

6.77.6.1 To Access the Codes - Billing Media Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Billing Media.	Billing Media panel displays.

6.77.6.2 To Add on the Codes - Billing Media Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Billing Media.	
3	Enter Description.	
4	Click **Save**.	Billing Media information is saved.

6.77.6.3 To Update on the Codes - Billing Media Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Billing Media information is saved.

6.77.6.4 To Delete on the Codes - Billing Media Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.78 Codes- Carrier Types Panel Overview

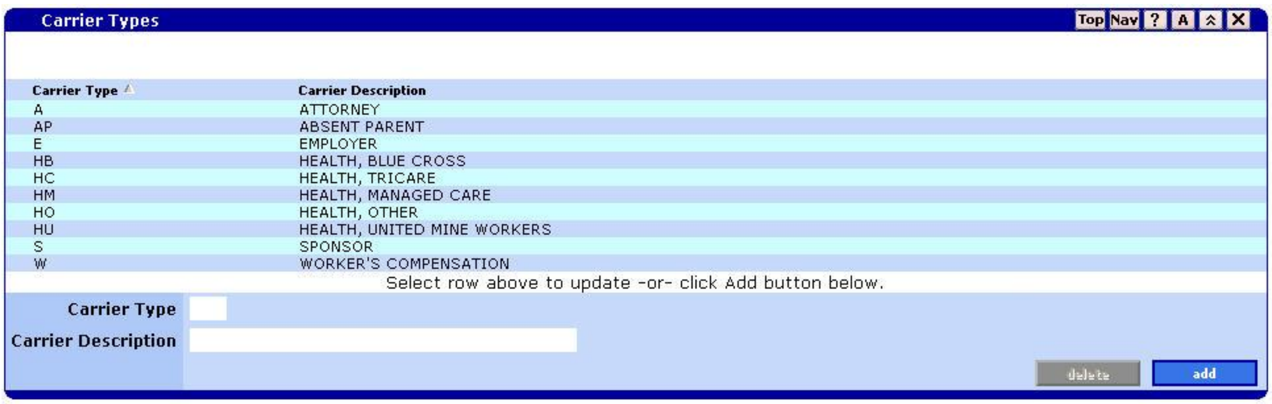
6.78.1 Codes-Carrier Types Panel Narrative

The Carrier Types panel contains the possible values for carrier types.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Carrier Types]

6.78.2 Codes-Carrier Types Panel Layout



6.78.3 Codes-Carrier Types Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Carrier Types panel.	Button	N/A	0
Carrier Type	This is the carrier type code.	Field	Character	2
Carrier Description	Description of the carrier type.	Field	Character	33
Delete	Allows a user to remove a record from the data list.	Button	N/A	0

6.78.4 Codes-Carrier Types Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Add	Button	4	Cannot add Carrier Type record. The Carrier Type already exists	Please correct the Carrier Type.
Carrier Type	Field	1	Carrier Type is Required.	Please enter a Carrier Type.
Carrier Description	Field	2	Carrier Description is Required.	Please enter a carrier Description.

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	3	Cannot delete Carrier Type record. In use by a carrier.	Remove the Carrier Type from all associated carrier records before deleting the carrier type record.

6.78.5 Codes-Carrier Types Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.78.6 Codes-Carrier Types Panel Accessibility

6.78.6.1 To Access the Codes - Carrier Types Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Carrier Types.	Carrier Types panel displays.

6.78.6.2 To Add on the Codes - Carrier Types Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Carrier Type.	
3	Enter Description.	
4	Click **Save**.	Carrier Types information is saved.

6.78.6.3 To Update on the Codes - Carrier Types Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Carrier Types information is saved.

6.78.6.4 To Delete on the Codes- Carrier Types Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.79 Codes - Case Status Panel Overview

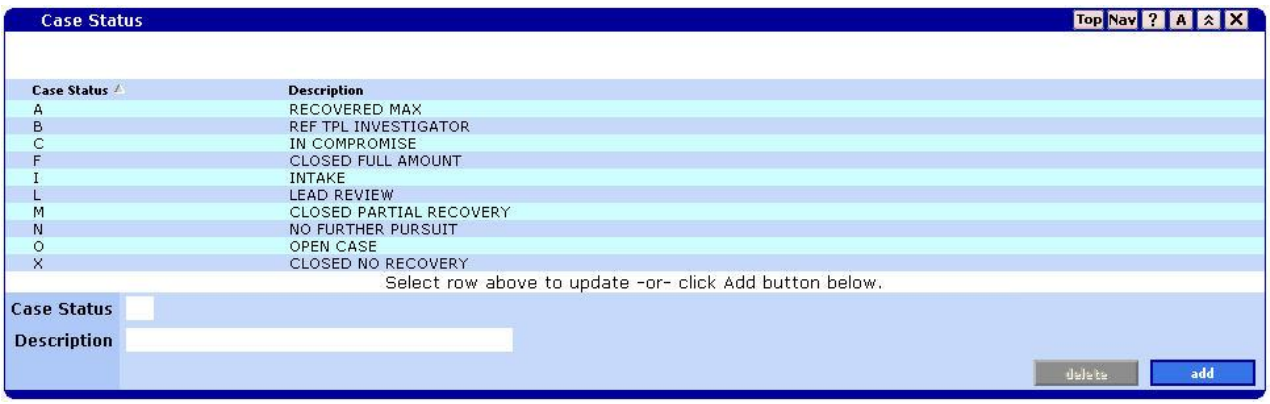
6.79.1 Codes - Case Status Panel Narrative

The Case Status panel displays the valid status codes of a TPL casualty case and its attendant description.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Case Status]

6.79.2 Codes - Case Status Panel Layout



6.79.3 Codes - Case Status Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Case Status panel.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
Case Status	This represents the current status of the casualty case. Valid values include: A = Recovered MAX-The total case amount was collected and dispositioned. B = In Compromise-The responsible party is negotiating a lower settlement amount. F = Closed Full Amount-The case is being closed due to no settlement. I = Intake-A lead has been received for potential recovery and the case has been added-but further research is needed for pursuing recoveries. L = Lead Review-The case has been transferred to a supervisor or designee for review. M = Closed Partial Recovery-The total case amount was not collected, but a partial recovery was received and dispositioned. N = No Further Pursuit-After further research, it was determined the case should not be pursued. O = Open Case-All research has been completed and the case should be pursued. X = Closed No Recovery-The case was pursued but no money is recoverable. This is a closed case. B = REF TPL Investigator-The case has been referred to a TPL Investigator for further analysis.	Field	Character	1
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	This is the description of the status code.	Field	Character	40

6.79.4 Codes - Case Status Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Case Status	Field	1	Case Status is required.	Enter a Case Status code.
Delete	Button	0	Cannot delete Case Status record. In use by Casualty Case.	Cannot delete Case Status record. In use by Casualty Case.
Description	Field	1	Description is required.	Enter a Description.

6.79.5 Codes - Case Status Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.79.6 Codes - Case Status Panel Accessibility

6.79.6.1 To Access the Codes - Case Status Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Case Status.	Case Status panel displays.

6.79.6.2 To Add on the Codes - Case Status Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Case Status.	
3	Enter Description.	
4	Click **Save**.	Case Status information is saved.

6.79.6.3 To Update on the Codes - Case Status Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Case Status information is saved.

6.79.6.4 To Delete on the Codes - Case Status Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.80 Codes - Case Type Panel Overview

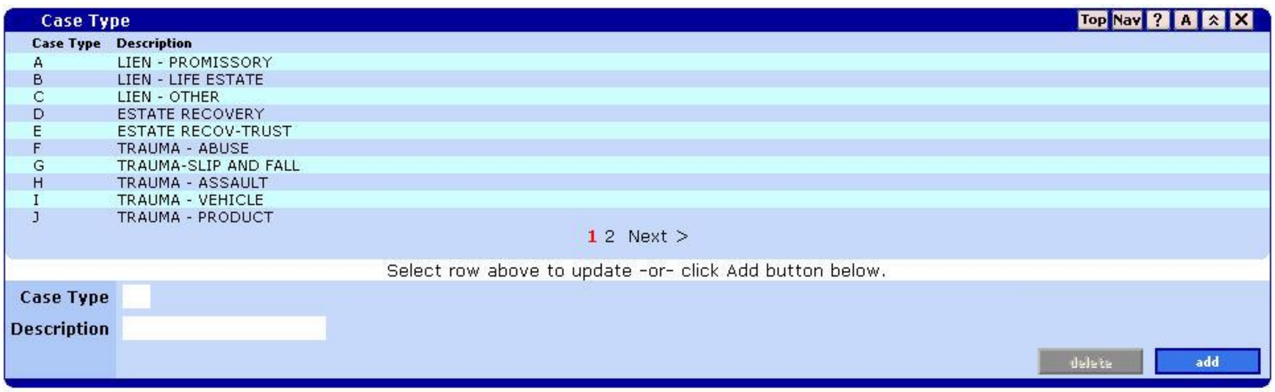
6.80.1 Codes - Case Type Panel Narrative

The Cases Type panel provides the TPL casualty case type and its' description.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Case Type]

6.80.2 Codes - Case Type Panel Layout



6.80.3 Codes - Case Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Case Type panel.	Button	N/A	0
Case Type	This indicates the type of the casualty case.	Field	Character	1
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	The description of the case type.	Field	Character	20

6.80.4 Codes - Case Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Case Type	Field	1	Case Type is required.	Enter a Case Type code.
Delete	Button	1	Delete was Unsuccessful. Cannot delete Case Types that are associated with Cases.	Case type has an associated case. Cannot delete this Case Type.
Description	Field	1	Description is required.	Enter a Description.

6.80.5 Codes - Case Type Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.80.6 Codes - Case Type Panel Accessibility

6.80.6.1 To Access the Codes - Case Type Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Case Type.	Case Type panel displays.

6.80.6.2 To Add on the Codes - Case Type Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Case Type.	
3	Enter Description.	
4	Click **Save**.	Case Type information is saved.

6.80.6.3 To Update on the Codes - Case Type Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Case Type information is saved.

6.80.6.4 To Delete on the Codes - Case Type Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.81 Codes - Chronological Panel Overview

6.81.1 Codes - Chronological Panel Narrative

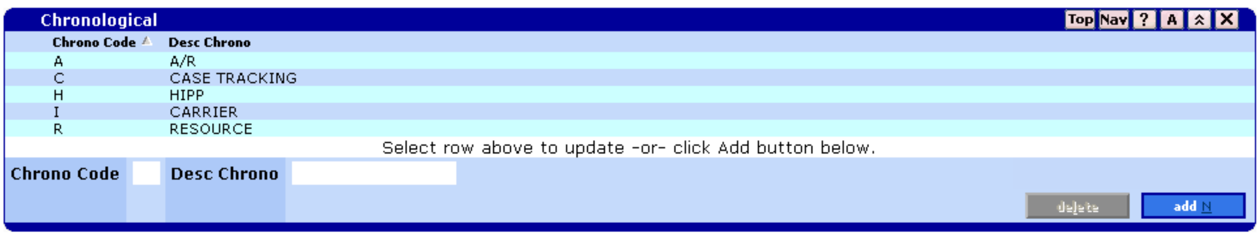
The Chronological panel contains the possible values for the TPL Chronological codes and their descriptions.

Delete operation only allowed if relationship to t_chrono_notes.cde_chrono does not exist. If a join exists for the code, then the delete is prevented.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Chronological]

6.81.2 Codes – Chronological Panel Layout



6.81.3 Codes – Chronological Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Code – Chronological panel.	Button	N/A	0
Chrono Code	This code is used to identify the chronological code, indicating if a sub area supports chronological notes.	Field	Character	1
Desc Chrono	This field provides a detailed description of the associated chronological code.	Field	Character	15
Delete	Allows a user to remove a record from the data list.	Button	N/A	0

6.81.4 Codes – Chronological Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	1	Cannot delete Chrono code record. In use by a sub area.	Remove the Chrono Code record before deleting record.
Chrono Code	Label	1	A duplicate record cannot be saved.	Enter a valid unique value for Chrono Code.
	Label	2	Chrono code is Required	Please add a Chrono Code.

Field	Field Type	Error Code	Error Message	To Correct
Description	Label	1	Description is Required.	Please add a narrative description for this chrono Code.

6.81.5 Codes – Chronological Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.81.6 Codes – Chronological Panel Accessibility

6.81.6.1 To Access Codes – Chronological Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Chronological.	Chronological panel displays.

6.81.6.2 To Add on the Codes - Chronological Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Chrono Code.	
3	Enter Desc Chrono.	
4	Click **Save**.	Chronological information is saved.

6.81.6.3 To Update on the Codes - Chronological Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Chronological information is saved.

6.81.6.4 To Delete on the Codes - Chronological Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.82 Codes - Claim Form Type Panel Overview

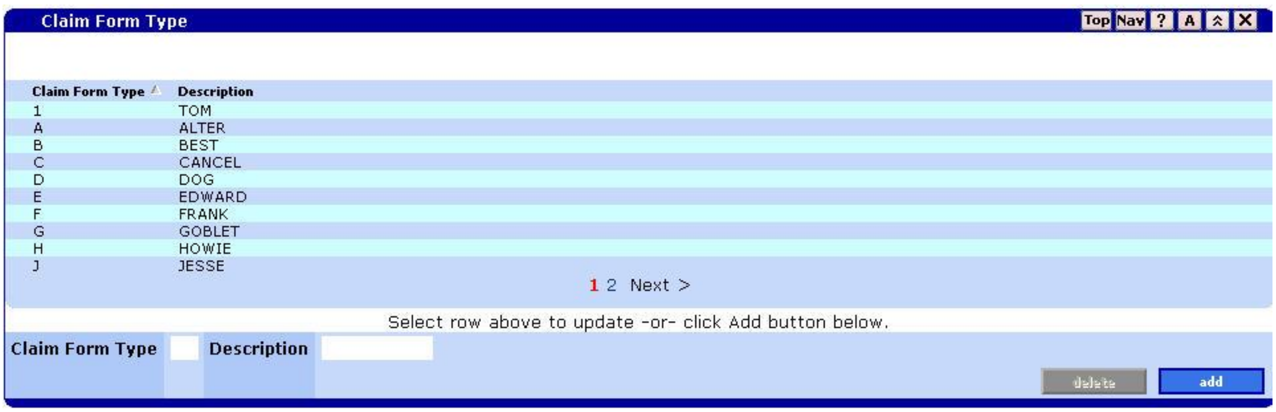
6.82.1 Codes - Claim Form Type Panel Narrative

The Claim Form Type panel contains the possible values for the TPL claim form type code. This field is used on the carrier table to indicate the type of claim form to be sent to the carrier (i.e., proprietary, universal HIPAA standard, none, etc.).

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Claim Form Type]

6.82.2 Codes - Claim Form Type Panel Layout



6.82.3 Codes - Claim Form Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Adds	Allows a user to add a new claim form type record.	Button	N/A	0
Claim Form Type	Identifies the claim form type on which a carrier wishes to receive TPL claim facsimiles.	Field	Character	1
Delete	Allows a user to remove a claim form type record.	Button	N/A	0
Description	Claim form description associated with a claim form type code.	Field	Character	10

6.82.4 Codes - Claim Form Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Claim Form Type	Field	1	Claim Form Type is required.	Enter a Claim Form Type code.
	Field	2	A duplicate record cannot be saved.	Enter a non-existing Claim Form Type code.

Field	Field Type	Error Code	Error Message	To Correct
	Field	3	Cannot delete Claim Form Type record. In use by another entity.	This Claim Form Type cannot be deleted, select another claim form type.
Description	Field	1	Description is required.	Enter a Description.

6.82.5 Codes - Claim Form Type Panel Extra Features

Referential integrity is performed on deletions of this code to ensure it is not used by a carrier.

6.82.6 Codes - Claim Form Type Panel Accessibility

6.82.6.1 To Access the Codes - Claim Form Type Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Claim Form Type.	Claim Form Type panel displays.

6.82.6.2 To Add on the Codes - Claim Form Type Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Claim Form Type.	
3	Enter Description.	
4	Click **Save**.	Claim Form Type information is saved.

6.82.6.3 To Update on the Codes - Claim Form Type Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Claim Form Type information is saved.

6.82.6.4 To Delete on the Codes - Claim Form Type Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.83 Codes - Copay Deductible Panel Overview

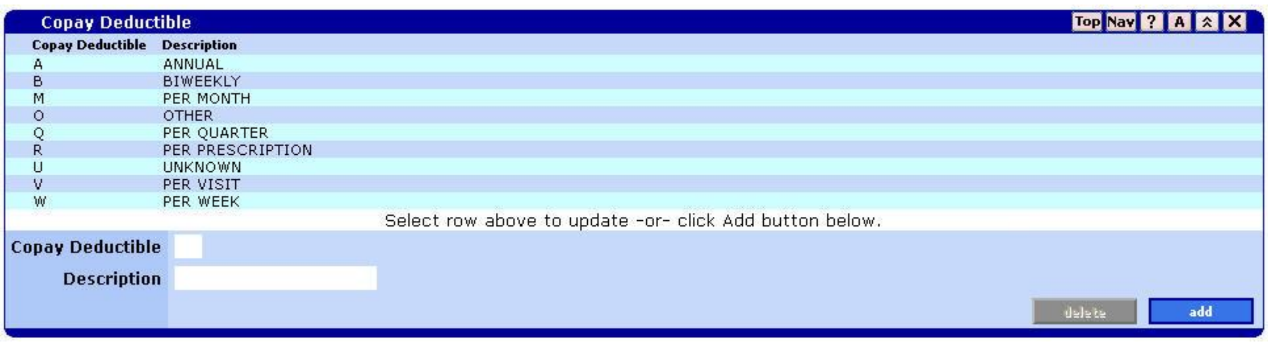
6.83.1 Codes - Copay Deductible Panel Narrative

The Copay Deductible panel describes the codes and descriptions used for copay and deductibles. The data on this panel is used on the TPL Policy Coverage panel to identify the frequency of copay and deductible.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Copay Deductible]

6.83.2 Codes - Copay Deductible Panel Layout



6.83.3 Codes - Copay Deductible Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Copay Deductible panel.	Button	N/A	0
Copay Deductible	Identifies the schedule for deductible, coinsurance, or premium payments for a specific coverage type of a policy.	Field	Character	1
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	Contains the description associated with a schedule code.	Field	Character	20

6.83.4 Codes - Copay Deductible Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Copay Deductible	Field	1	Copay Deductible is required.	Enter a Copay Deductible code.
Description	Field	1	Description is required.	Enter a Description.

6.83.5 Codes - Copay Deductible Panel Extra Features

This panel uses referential integrity to ensure deletions are cross-checked against policies. If a record is being used, the deletion is prevented.

6.83.6 Codes - Copay Deductible Panel Accessibility

6.83.6.1 To Access the Codes - Copay Deductible Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Copay Deductible.	Copay Deductible panel displays.

6.83.6.2 To Add on the Codes - Copay Deductible Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Copay Deductible.	
3	Enter Description.	
4	Click **Save**.	Copay Deductible information is saved.

6.83.6.3 To Update on the Codes - Copay Deductible Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Copay Deductible information is saved.

6.83.6.4 To Delete on the Codes - Copay Deductible Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.84 Codes - Court Order Panel Overview

6.84.1 Codes - Court Order Panel Narrative

The Court Order panel contains the possible values for the TPL Court Ordered codes and their descriptions.

Delete operation only allowed if relationship to t_tpl_resource.cde_court_order does not exist. If a join exists for the code, then the delete is prevented.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Court Order]

6.84.2 Codes - Court Order Panel Layout

6.84.3 Codes - Court Order Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Court Order panel.	Button	N/A	0
Court Order Code	Used to identify the court ordered code, indicating if a TPL Resource is required via a legal decision.	Field	Character	1
Court Order Description	Provides a detailed description of the associated court ordered code.	Field	Character	15
Delete	Allows a user to remove a record from the data list.	Button	N/A	0

6.84.4 Codes - Court Order Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Court Order Code	Field	1	Court Ordered code is Required.	Please add a Court Ordered Code.
Court Order Description	Field	1	Description is Required.	Please add a narrative Description for this court ordered code.

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	1	Cannot delete Court Ordered record. In use by a TPL Resource.	Remove the Court Ordered Code from all associated resource records before deleting record.

6.84.5 Codes - Court Order Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.84.6 Codes - Court Order Panel Accessibility

6.84.6.1 To Access the Codes - Court Order Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Court Order.	Court Order panel displays.

6.84.6.2 To Add on the Codes - Court Order Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Court Order Code.	
3	Enter Court Order Description.	
4	Click **Save**.	Court Order information is saved.

6.84.6.3 To Update on the Codes - Court Order Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Court Order information is saved.

6.84.6.4 To Delete on the Codes - Court Order Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.85 Codes - Coverage Type Panel Overview

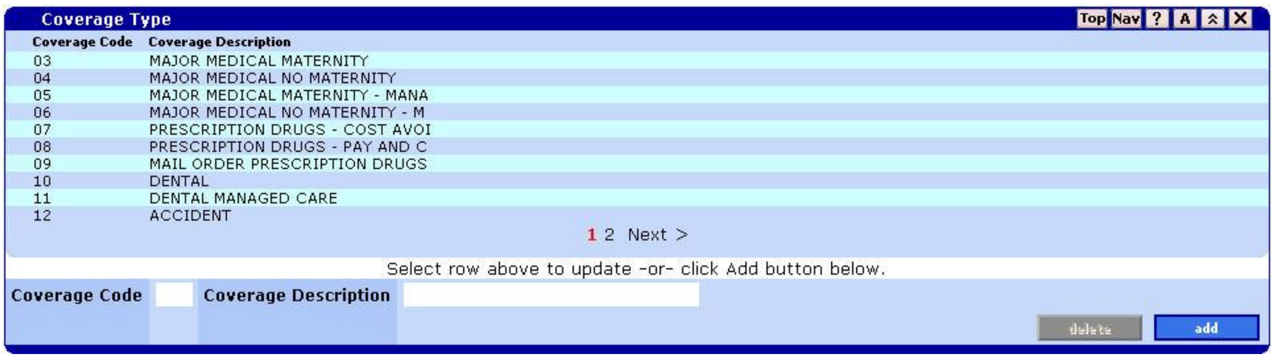
6.85.1 Codes - Coverage Type Panel Narrative

The Coverage Type panel contains the possible values for the TPL Coverage Type codes and their descriptions.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Coverage Type]

6.85.2 Codes - Coverage Type Panel Layout



6.85.3 Codes - Coverage Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Coverage Type panel.	Button	N/A	0
Coverage Code	Identifies the type of coverage that a TPL policy provides.	Field	Character	2
Coverage Description	Describes the type of coverage (services) a TPL resource provides.	Field	Character	120
Delete	Allows a user to remove a record from the data list.	Button	N/A	0

6.85.4 Codes - Coverage Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Coverage Code	Field	1	Coverage Code is required.	Enter code for coverage type.
Coverage Description	Field	1	Coverage Description is required.	Enter Description of coverage type.

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	1	Coverage Type - delete was unsuccessful. Record in use by a policy or TPL matrix.	Review entry.

6.85.5 Codes - Coverage Type Panel Extra Features

Referential integrity checks are applied when attempting deletes. A coverage code cannot be deleted if it is associated with any of the following:

Policy

Coverage to OI Plan Xref

6.85.6 Codes - Coverage Type Panel Accessibility

6.85.6.1 To Access the Codes - Coverage Type Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Coverage Type.	Coverage Type panel displays.

6.85.6.2 To Add on the Codes - Coverage Type Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Coverage Code.	
3	Enter Coverage Description.	
4	Click **Save**.	Coverage Type information is saved.

6.85.6.3 To Update on the Codes - Coverage Type Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Coverage Type information is saved.

6.85.6.4 To Delete on the Codes - Coverage Type Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.86 Codes - HIPAA Relationship Panel Overview

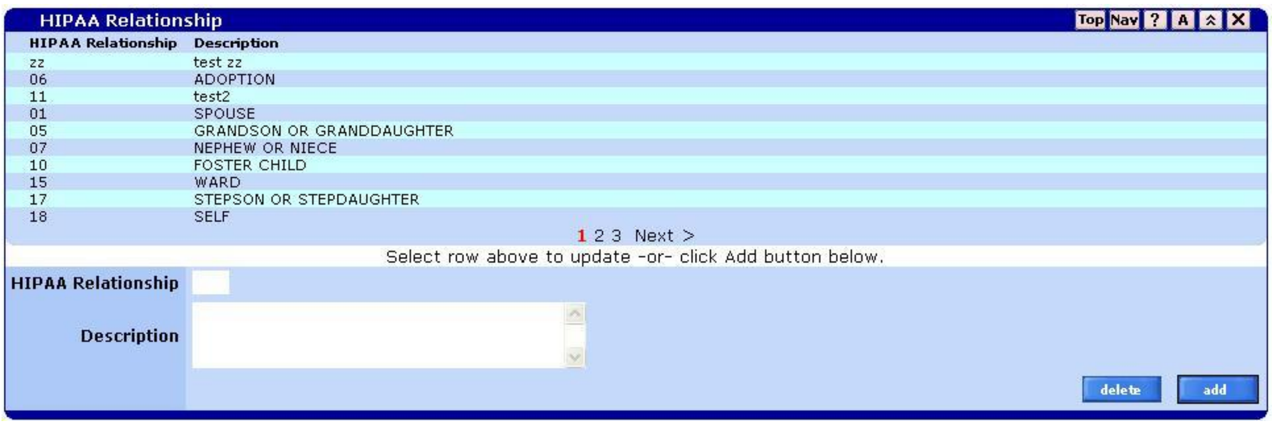
6.86.1 Codes - HIPAA Relationship Panel Narrative

The HIPAA Relationship panel contains the HIPAA relationship code values and their descriptions.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [HIPAA Relationship]

6.86.2 Codes - HIPAA Relationship Panel Layout



6.86.3 Codes - HIPAA Relationship Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Code – HIPAA Relationship panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	Contains the description associated with a specific HIPAA relationship code.	Field	Character	120
HIPAA Relationship	Identifies the relationship of the recipient to the policyholder.	Field	Character	2

6.86.4 Codes - HIPAA Relationship Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	1	Cannot delete the HIPAA relation: Integrity with Relation Code.	Cannot delete because Relation code exists.
Description	Field	1	Description is required.	Enter a Description.

Field	Field Type	Error Code	Error Message	To Correct
HIPAA Relationship	Field	1	HIPAA Relationship is required.	Enter a HIPAA Relationship code.
	Field	2	Cannot add a duplicated HIPAA Relationship.	Verify HIPAA Relationship Code.

6.86.5 Codes - HIPAA Relationship Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.86.6 Codes - HIPAA Relationship Panel Accessibility

6.86.6.1 To Access the Codes - HIPAA Relationship Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select HIPAA Relationship.	HIPAA Relationship panel displays.

6.86.6.2 To Add on the Codes - HIPAA Relationship Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter HIPAA Relationship.	
3	Enter Description.	
4	Click **Save**.	HIPAA Relationship information is saved.

6.86.6.3 To Update on the Codes - HIPAA Relationship Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPAA Relationship information is saved.

6.86.6.4 To Delete on the Codes - HIPAA Relationship Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.87 Codes - HIPAA Service Type Panel Overview

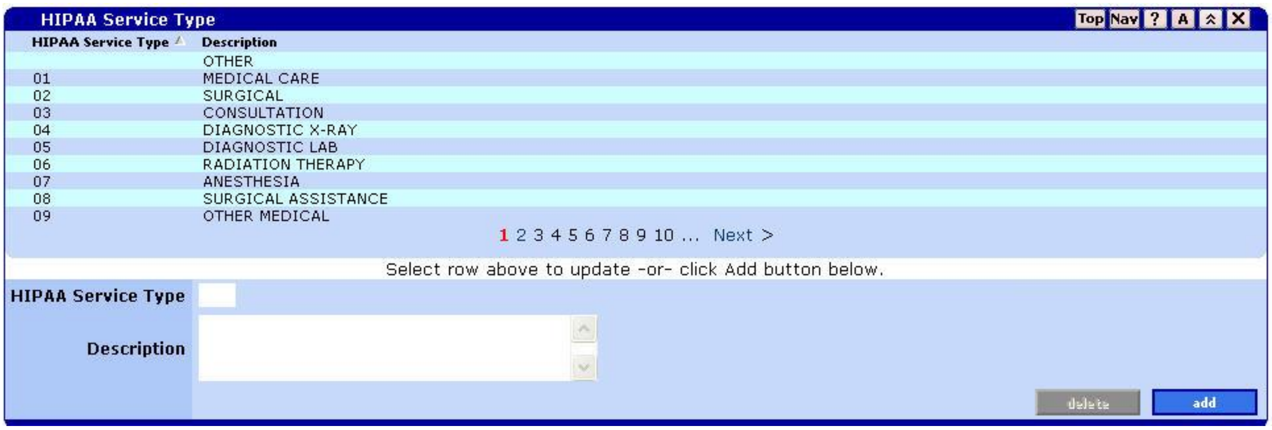
6.87.1 Codes - HIPAA Service Type Panel Narrative

The HIPAA Service Type panel contains the HIPAA service type code which describes the type of coverage a recipient has with a policy.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [HIPAA Service Type]

6.87.2 Codes - HIPAA Service Type Panel Layout



6.87.3 Codes - HIPAA Service Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – HIPAA Service Type panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	The description for the HIPAA service type code.	Field	Character	120
HIPAA Service Type	This field contains the HIPAA service type code which describes the type of coverage a recipient has with a policy.	Field	Character	2

6.87.4 Codes - HIPAA Service Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	0	Cannot delete HIPAA Service Type Record. In use by Coverage Code - cross-reference.	Verify HIPAA Service Type.
Description	Field	1	Description is required.	Enter a Description.
HIPAA Service Type	Field	1	HIPAA Service Type is required.	Enter a HIPAA Service Type code.
	Field	2	HIPAA Service Type Code already exists.	Verify HIPAA Service Type Code.

6.87.5 Codes -HIPAA Service Type Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.87.6 Codes - HIPAA Service Type Panel Accessibility

6.87.6.1 To Access the Codes - HIPAA Service Type Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select HIPAA Service Type.	HIPAA Service Type panel displays.

6.87.6.2 To Add on the Codes - HIPAA Service Type Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter HIPAA Service Type.	
3	Enter Description.	
4	Click **Save**.	HIPAA Service Type information is saved.

6.87.6.3 To Update on the Codes - HIPAA Service Type Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.

Step	Action	Response
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPAA Service Type information is saved.

6.87.6.4 To Delete on the Codes - HIPAA Service Type Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

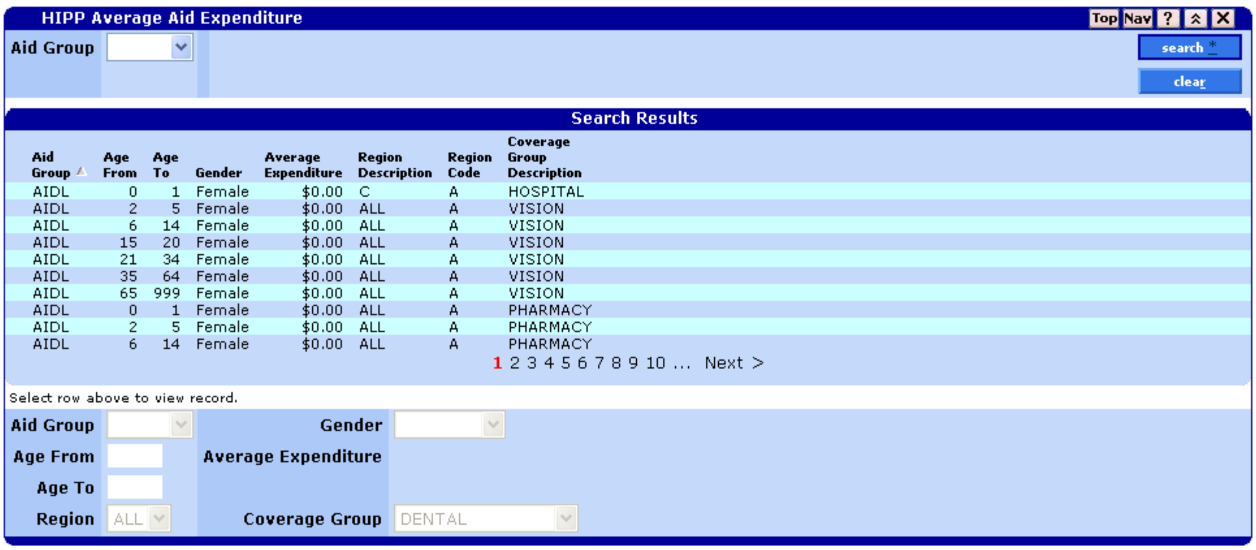
6.88 Codes - HIPP Average Aid Expenditure Panel Overview

6.88.1 Codes - HIPP Average Aid Expenditure Panel Narrative

The HIPP Average Aid Expenditure panel is used to display a list of the current HIPP average expenditure code tables, grouped by population code. It is used in the HIPP cost effectiveness calculation. This panel is display only.

Navigation Path: [TPL] - [Related Data] - [Codes] - [HIPP Average Aid Expenditure]

6.88.2 Codes - HIPP Average Aid Expenditure Panel Layout



6.88.3 Codes - HIPP Average Aid Expenditure Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Age From	The starting age for the grouping.	Field	Number (Integer)	4
Age To	The ending age for the grouping.	Field	Number (Integer)	4
Aid Group	This groups aid categories into specific groups with similar characteristics.	Combo Box	Drop Down List Box	0
Average Expenditure	The dollar amount of the expenditure.	Field	Number (Decimal)	9
Clear	Clears fields of data.	Button	N/A	0
Coverage Group	This group identifies the type of coverage that a TPL policy provides.	Combo Box	Drop Down List Box	0
Coverage Group Description	Description of the coverage group.	Label	N/A	0
Gender	Identifies the sex of a person.	Combo Box	Drop Down list Box	0

Field	Description	Field Type	Data Type	Length
Region	Geographical code for the expenditure.	Field	Alphanumeric	4
Region Description	Description of the geographical location.	Field	Alphanumeric	25
Search	Invokes search on Aid Group.	Button	N/A	0

6.88.4 Codes - HIPP Average Aid Expenditure Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Age From	Field	1	Enter a valid value.	Enter a value between 0 and 9999.
	Field	2	Age From must be less than or equal to 9999.	Enter a value less than or equal to 9999.
Age To	Field	1	Enter a valid value.	Enter a value between 0 and 9999.
Aid Group	Field	1	Aid Group ID is required.	Enter a valid Aid Group ID.
Average Expenditure	Field	1	Enter a valid value.	Enter a value between $0.00 and $999,999,999.99.
Coverage Code	Field	1	A valid Coverage Code is required.	Enter a valid Coverage Code.
Gender	Field	1	Gender is required.	Enter the Gender of the person.

6.88.5 Codes - HIPP Average Aid Expenditure Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.88.6 Codes - HIPP-Average Aid Expenditure Panel Accessibility

6.88.6.1 To Access the Codes - HIPP Average Aid Expenditure Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select HIPP Average Aid Expenditures.	HIPP Average Aid Expenditure panel displays.

6.89 Codes - HIPP Average Diag Expenditure Panel Overview

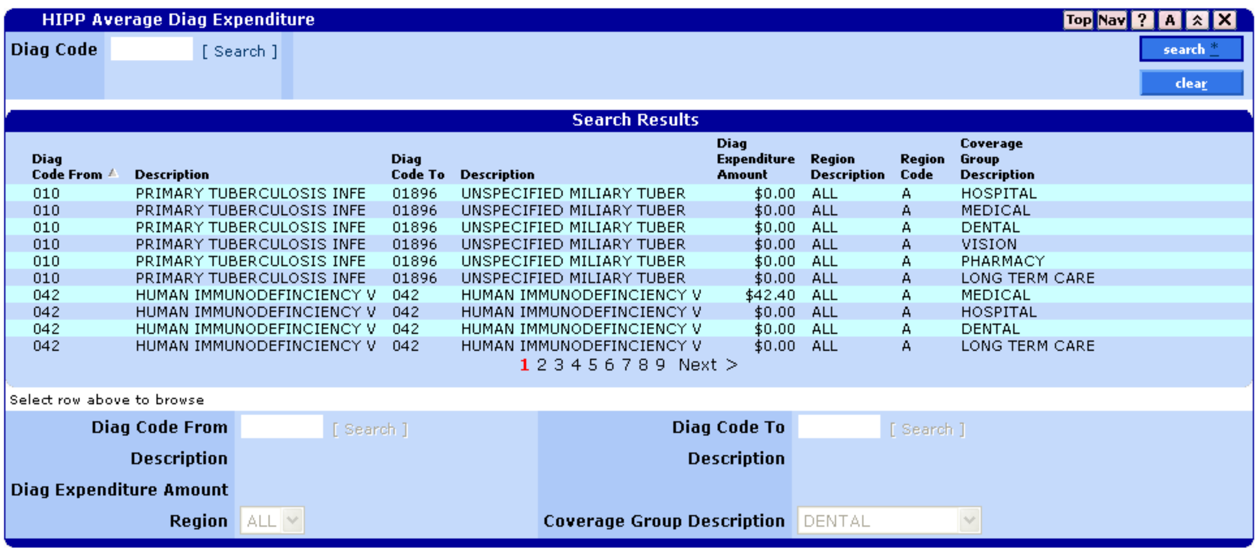
6.89.1 Codes - HIPP Average Diag Expenditure Panel Narrative

The HIPP Average Diag Expenditure panel is used to display a list of the current HIPP average diagnosis code table, grouped by diagnosis code. It is used in the HIPP cost effectiveness calculation.

This panel is display only.

Navigation Path: [TPL] - [Related Data] - [Codes] - [HIPPA Average Diag Expenditure]

6.89.2 Codes - HIPP Average Diag Expenditure Panel Layout



6.89.3 Codes - HIPP Average Diag Expenditure Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Clear	Clears fields of data.	Button	N/A	0
Coverage Group Description	Description of the coverage code. Automatically prefills based on the coverage code selected.	Field	Alphanumeric	25
Description	The short nomenclature for a medical condition.	Field	Character	25
Diag Code	A code for the condition requiring medical attention.	Combo Box	Drop Down List Box	0
Diag Code From	A code for the condition requiring medical attention.	Field	Character	7

Field	Description	Field Type	Data Type	Length
Diag Code To	A code for the condition requiring medical attention.	Field	Character	7
Diag Expenditure Amount	The dollar amount of the expenditure.	Field	Number (Decimal)	9
Region Code	The geographical location	Combo Box	Drop Down List Box	0
Region Description	Description of the geographical location.	Field	Alphanumeric	25
Search	Invokes search on Diagnosis Code.	Button	N/A	0

6.89.4 Codes - HIPP Average Diag Expenditure Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Diag Code From	Field	1	A valid Diagnosis Code is required.	Select a valid Diagnosis Code from the list.
Diag Expenditure Amount	Field	1	Enter a valid value.	Diagnosis Expenditure Amount is numeric only.
Region	Field	1	A valid Region is required.	Enter a valid Region code.

6.89.5 Codes - HIPP Average Diag Expenditure Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.89.6 Codes - HIPP Average Diag Expenditure Panel Accessibility

6.89.6.1 To Access the Codes - HIPP Average Diag Expenditure Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select HIPP Average Diag Expenditures.	HIPP Average Diag Expenditure panel displays.

6.90 Codes-HIPP Reason Panel Overview

6.90.1 Codes - HIPP Reason Panel Narrative

The HIPP Reason panel identifies the decision to purchase a policy or not based on the HIPP calculation.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Codes] - [HIPP Reason]

6.90.2 Codes - HIPP Reason Panel Layout

6.90.3 Codes - HIPP Reason Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes - HIPP Reason panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	Description of the code that identifies why a policy was or was not purchased.	Field	Character	40
HIPP Reason	Code that identifies why a policy was or was not purchased.	Field	Character	2
Policy Purchased	Identifies whether the policy will be purchased.	Combo Box	Drop Down List Box	0

6.90.4 Codes - HIPP Reason Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Description	Field	1	Description is required.	Enter a Description.
HIPP Reason	Field	1	HIPP Reason is required.	Enter a HIPP Reason code.

Field	Field Type	Error Code	Error Message	To Correct
Policy Purchased	Listview	1	Policy Purchased is required.	Select a Policy Purchased value.

6.90.5 Codes - HIPP Reason Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.90.6 Codes - HIPP Reason Panel Accessibility

6.90.6.1 To Access the Codes - HIPP Reason Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select HIPP Reason.	HIPP Reason panel displays.

6.90.6.2 To Add on the Codes - HIPP Reason Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter HIPP Reason.	
3	Enter Description.	
4	Select **Policy Purchased** from drop down list.	
5	Click **Save**.	HIPP Reason information is saved.

6.90.6.3 To Update on the Codes - HIPP Reason Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPP Reason information is saved.

6.90.6.4 To Delete on the Codes - HIPP Reason Panel

Stp	Actione	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.91 Codes-HMO/PPO Panel Overview

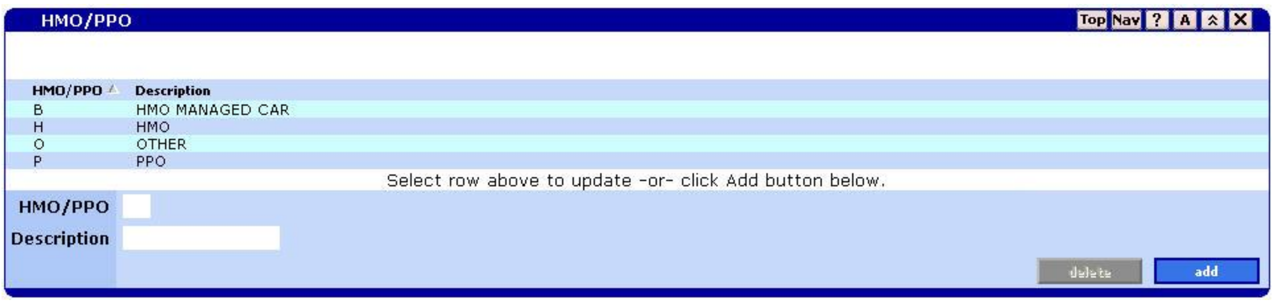
6.91.1 Codes-HMO/PPO Panel Narrative

HMO/PPO panel contains the possible values for the TPL carrier HMO indicator code. The values are used by the carrier panels to indicate additional information about a carrier.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Codes] - [HMO/PPO]

6.91.2 Codes-HMO/PPO Panel Layout



6.91.3 Codes-HMO/PPO Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – HMO/PPO panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	Contains the description associated with a specific HMO indicator code.	Field	Character	15
HMO/PPO	Identifies whether a TPL carrier is an HMO or PPO.	Field	Character	1

6.91.4 Codes-HMO/PPO Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Add	Button	1	A duplicate record cannot be saved.	Enter a new different value.
Description	Field	1	Description is required.	Enter a Description.
HMO/PPO	Field	1	HMO/PPO is required.	Enter a HMO/PPO code.

6.91.5 Codes-HMO/PPO Panel Extra Features

This panel utilizes referential integrity on deletes.

6.91.6 Codes-HMO/PPO Panel Accessibility

6.91.6.1 To Access the Codes- HMO/PPO Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select **HMO/PPO**.	HMO/PPO panel displays.

6.91.6.2 To Add on the Codes- HMO/PPO Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **HMO/PPO**.	
3	Enter Description.	
4	Click **Save**.	HMO/PPO information is saved.

6.91.6.3 To Update on the Codes - HMO/PPO Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HMO/PPO information is saved.

6.91.6.4 To Delete on the Codes - HMO/PPO Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.92 Codes - Origin Panel Overview

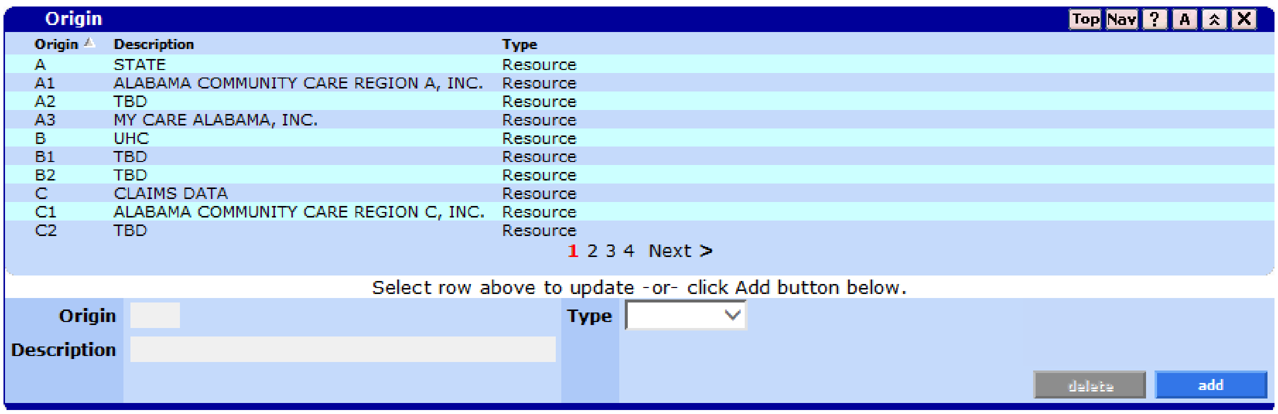
6.92.1 Codes - Origin Panel Narrative

The Origin panel identifies the source of TPL coverage information or the source of changes to existing TPL coverage information.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Codes] - [Origin]

6.92.2 Codes - Origin Panel Layout



6.92.3 Codes - Origin Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Origin panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	Contains the description associated with a specific TPL origin code.	Field	Character	40
Origin	Identifies the source of TPL coverage information or the source of changes to existing TPL coverage information.	Field	Character	2
Type	Unique identifier for the resource casualty associated with the origin of this TPL.	Combo Box	Drop Down List Box	0

6.92.4 Codes - Origin Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	1	Cannot delete Origin code for both types. In use by a TPL Resource and a Casualty Case.	Verify information and try again.
	Button	2	Cannot delete Origin code for the TPL Resource type. In use by a TPL resource.	Verify Information and try again.
	Button	3	Cannot delete Origin code for the Casualty Case type. In use by a Casualty Case.	Verify Information and try again.
Description	Field	1	Description is required.	Enter a Description.
Origin	Field	1	Origin is required.	Enter an Origin code.
Type	Listview	1	Type is required.	Select a Type value.

6.92.5 Codes - Origin Panel Extra Features

This panel has referential integrity checks on deletions.

6.92.6 Codes - Origin Panel Accessibility

6.92.6.1 To Access the Codes - Origin Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select **Origin**.	Origin panel displays.

6.92.6.2 To Add on the Codes - Origin Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Origin**.	
3	Enter Description.	
4	Select **Type** from the drop down list.	
5	Click **Save**.	Origin information is saved.

6.92.6.3 To Update on the Codes - Origin Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Origin information is saved.

6.92.6.4 To Delete on the Codes - Origin Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.93 Codes - Policy Type Panel Overview

6.93.1 Codes - Policy Type Panel Narrative

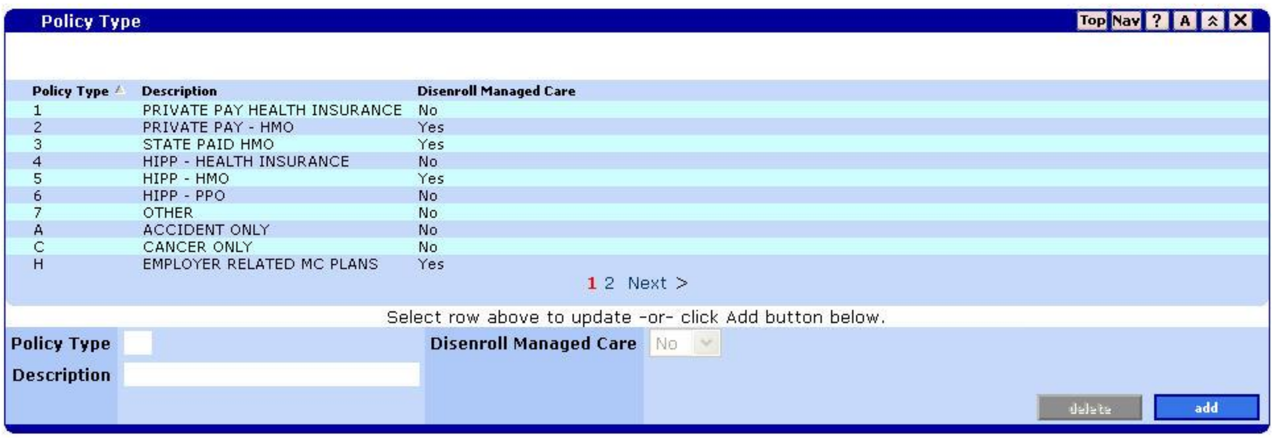
The Policy Type panel identifies the type of insurance policy the recipient is covered under.

Primarily, there are three types of insurance: HMO, PPO and Other. If a policy type is HMO, then the Disenroll Managed Care indicator should typically be 'Y'. This indicator triggers the Managed Care system to automatically disenroll recipients from Managed Care.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Policy Type]

6.93.2 Codes - Policy Type Panel Layout



6.93.3 Codes - Policy Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Policy Type panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	Identifies the descriptive name for a TPL policy type.	Field	Character	30
Disenroll Managed Care	Yes/No option which indicates whether the policy type should trigger disenrollment from Managed Care.	Combo Box	Drop Down List Box	0
Policy Type	Identifies the type of insurance policy that the recipient is covered under.	Field	Character	1

6.93.4 Codes - Policy Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	1	Cannot delete Policy Type record. In use by a TPL Resource.	This policy type can not be deleted since it is attached to a TPL Resource.
Description	Field	1	Description is required.	Description is a required field. Enter a Description for this policy type.
Policy Type	Field	1	Policy Type is required.	Policy Type is a required field code. Enter a Policy Type for this entry.
	Field	3	A duplicate record cannot be saved.	Add a Policy Type that does not exist already.

6.93.5 Codes - Policy Type Panel Extra Features

This panel has referential integrity checks on deletes.

6.93.6 Codes - Policy Type Panel Accessibility

6.93.6.1 To Access the Codes - Policy Type Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Policy Type.	Policy Type panel displays.

6.93.6.2 To Add on the Codes - Policy Type Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Policy Type.	
3	Enter Description.	
4	Select **Disenroll Managed Care** from the drop down list.	
5	Click **Save**.	Policy Type information is saved.

6.93.6.3 To Update on the Codes - Policy Type Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Policy Type information is saved.

6.93.6.4 To Delete on the Codes - Policy Type Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.94 Codes - Relationship Panel Overview

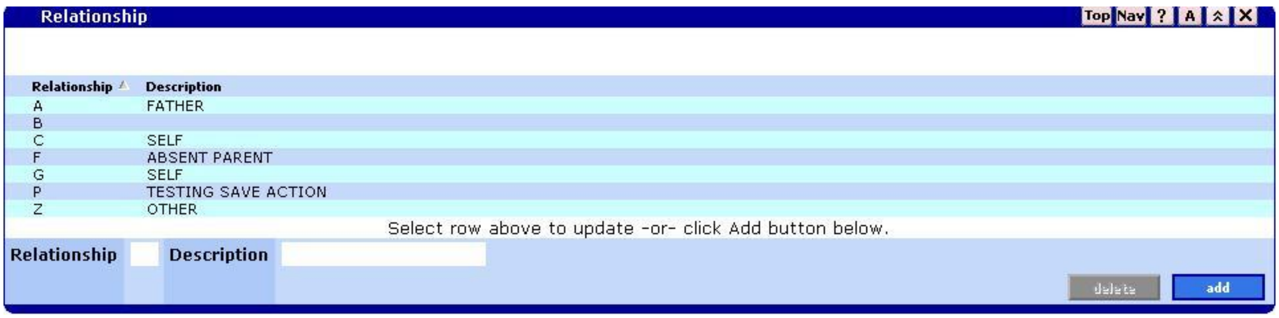
6.94.1 Codes - Relationship Panel Narrative

The Codes-Relationship panel contains the possible values for the local relationship codes and their descriptions.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Codes] - [Relationship]

6.94.2 Codes - Relationship Panel Layout



6.94.3 Codes - Relationship Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes – Relationship panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	This field contains the description associated with a specific relationship code.	Field	Alphanumeric	20
Relationship	This code identifies the relationship of the policyholder to the recipient covered by a TPL policy.	Field	Alphanumeric	1

6.94.4 Codes - Relationship Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Description	Field	1	Description is required.	To enter a new record, Description for the relationship code is required.
Relationship	Field	1	A duplicate record cannot be saved.	Enter a valid Relationship code that is not already existing.
	Field	2	Delete was Unsuccessful. Cannot delete Relationship Codes with TPL Resource.	Relationship codes that are in t_tpl_resource cannot be deleted.

Field	Field Type	Error Code	Error Message	To Correct
	Field	3	Relationship is required.	Relationship code is required for a new record. Enter relationship code.

6.94.5 Codes - Relationship Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.94.6 Codes - Relationship Panel Accessibility

6.94.6.1 To Access the Codes - Relationship Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data.**	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select Relationship.	Relationship panel displays.

6.94.6.2 To Add on the Codes - Relationship Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Relationship.	
3	Enter Description.	
4	Click **Save**.	Relationship information is saved.

6.94.6.3 To Update on the Codes - Relationship Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Relationship information is saved.

6.94.6.4 To Delete on the Codes - Relationship Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.95 Codes - Suspect Panel Overview

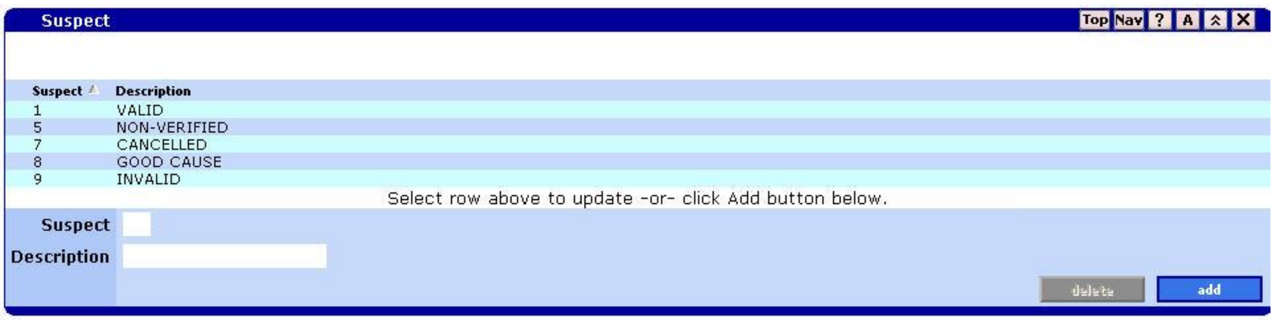
6.95.1 Codes - Suspect Panel Narrative

The Suspect panel identifies the possible values for the TPL suspect code. The suspect code is used on TPL Policies to indicate if cost avoidance should occur.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Codes] - [Suspect]

6.95.2 Codes - Suspect Panel Layout



6.95.3 Codes - Suspect Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Codes - Suspect panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Description	Contains the description associated with a specific TPL suspect code.	Field	Character	20
Suspect	Identifies the TPL suspect code which identifies whether a TPL resource is suspect and, if so, how it was determined to be suspect.	Field	Character	1

6.95.4 Codes - Suspect Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Delete	Button	1	Cannot Delete Suspect Code record. In use by TPL Resource.	Mush change the Suspect Code on all resource records before deleting.
Description	Field	1	Description is required.	Enter a Description.
Suspect	Field	1	Suspect is required.	Enter a Suspect code.

6.95.5 Codes - Suspect Panel Extra Features

Referential integrity checks occur when deletions are attempted.

6.95.6 Codes - Suspect Panel Accessibility

6.95.6.1 To Access the Codes - Suspect Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Codes** hyperlink located on the Related Data panel.	Related Data-Codes panel displays.
4	Select **Suspect**.	Suspect panel displays.

6.95.6.2 To Add on the Codes - Suspect Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Suspect**.	
3	Enter Description.	
4	Click **Save**.	Suspect information is saved.

6.95.6.3 To Update on the Codes - Suspect Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Suspect information is saved.

6.95.6.4 To Delete on the Codes - Suspect Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.96 Related Data - Other Panel Overview

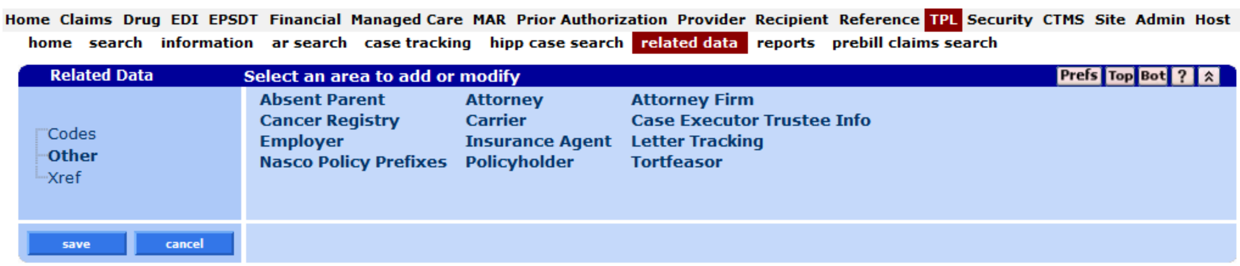
6.96.1 Related Data - Other Panel Narrative

The point of access for the TPL Related Data Other panels.

This panel is inquiry only.

Navigation Path: [TPL] – [Related Data] - [Other]

6.96.2 Related Data - Other Panel Layout



6.96.3 Related Data - Other Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Absent Parent	Link to Absent Parent panel.	Hyperlink	N/A	0
Attorney	Link to Attorney panel.	Hyperlink	N/A	0
Attorney Firm	Link to Attorney Firm panel.	Hyperlink	N/A	0
Cancel	Allows the user to cancel any changes.	Button	N/A	0
Cancer Registry	Link to Cancer Registry panel.	Hyperlink	N/A	0
Carrier	Link to Carrier panel.	Hyperlink	N/A	0
Case Executor Trustee Info	Link to Case Trustee Info panel.	Hyperlink	N/A	0
Employer	Link to Employer panel.	Hyperlink	N/A	0
Insurance Agent	Link to Insurance Agent panel.	Hyperlink	N/A	0
Letter Tracking	Link to Letter Tracking panel.	Hyperlink	N/A	0
Nasco Policy Prefixes	Link to Nasco Policy Prefixes panel.	Hyperlink	N/A	0
Policyholder	Link to Policyholder panel.	Hyperlink	N/A	0
Save	Allows the user to save a record.	Button	N/A	0
Tortfeasor	Link to Tortfeasor panel.	Hyperlink	N/A	0

6.96.4 Related Data - Other Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.96.5 Related Data - Other Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.96.6 Related Data - Other Panel Accessibility

6.96.6.1 To Access the Related Data – Other Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.

6.97 Other - Absent Parent Panel Overview

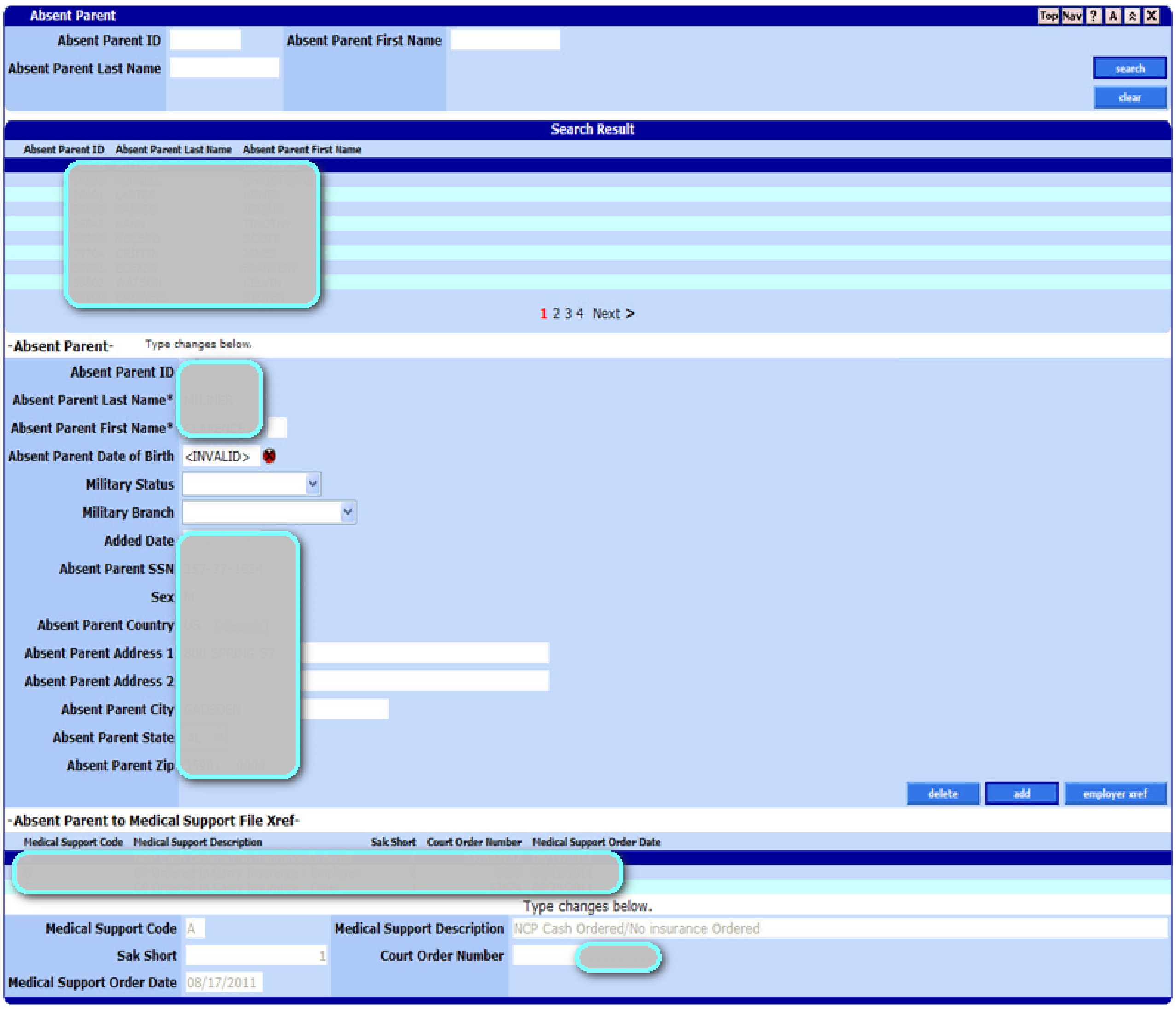
6.97.1 Other - Absent Parent Panel Narrative

The TPL Absent Parent panel allow for the creation and maintenance of Absent Parents.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Other] - [Absent Parent]

6.97.2 Other - Absent Parent Panel Layout



6.97.3 Other - Absent Parent Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Absent Parent Address 1	The first address line of the absent parent used for correspondence. Could be an international address if country code is not US.	Field	Character	55
Absent Parent Address 2	The second address line of the absent parent used for correspondence. Could be an international address if country code is not US.	Field	Character	55
Absent Parent City	The absent parent's city where the correspondence is sent.	Field	Character	30
Absent Parent Country	Two character country abbreviation.	Field	Character	2
Absent Parent Date of Birth	Absent parents date of birth.	Field	Date (MM/DD/CCYY)	10
Absent Parent First Name	The first name of the recipient's absent or custodial parent.	Field	Character	13
Absent Parent ID	The unique identifier for the recipient's absent parent.	Field	Number (Integer)	9
Absent Parent Last Name	The last name of the recipient's absent or custodial parent.	Field	Character	15
Absent Parent Middle Initial	The middle name of the recipient's absent or custodial parent.	Field	Character	1
Absent Parent SSN	The absent parent's Social Security Number.	Field	Number (Integer)	9
Absent Parent State	The state abbreviation for the state in which the absent parent resides.	Combo Box	Drop Down List Box	0
Absent Parent Zip	The first five digits of the absent parent's zip code used for correspondence.	Field	Number (Integer)	15
Absent Parent Zip + 4	The last four digits of the zip code for correspondence of an absent parent if within the United States.	Field	Number (Integer)	4
Add	Allows a user to add a new record on the Other – Absent Parent panel.	Button	N/A	0
Added Date	The date the absent parent data was added to the table.	Field	Date (MM/DD/CCYY)	10
Court Order Number	Court Order Number.	Field	Character	16

Field	Description	Field Type	Data Type	Length
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Employer Xref	Link to the Absent Parent to Employer Xref panel.	Button	N/A	0
Medical Support Code	Medical Support Code.	Field	Character	1
Medical Support Description	Medical Support Code Description.	Field	Character	100

6.97.4 Other - Absent Parent Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Absent Parent First Name	Field	1001	First Name is required.	Enter an Absent Parent First Name.
Absent Parent Last Name	Field	1002	Last Name is required.	Enter an Absent Parent Last Name.
Absent Parent SSN	Field	1001	Enter a Valid Value.	Social Security Number must be only numeric values. Social Security Number must be 9 numeric digits.
Absent Parent State	Field	1001	Please enter a valid state.	Please enter a valid state.
Absent Parent Zip	Field	1001	Zip Code must be only numeric values.	Enter valid ZIP code.
	Field	1002	Zip Code must be 5 numeric digits.	Enter valid ZIP Code.
Absent Parent Zip + 4	Field	1001	Cannot have Zip Plus 4 without Zip Code.	Cannot have Zip Plus 4 without Zip Code.
	Field	1002	Enter a Valid Value.	Zip Plus 4 must be only numeric values.
Employer Number	Field	1001	A valid Employer is required.	Enter or search for a valid employer.
Sex	Field	1001	Valid sex codes are be \"M\" - Male or \"F\" - Female.	Enter only valid sex codes.

6.97.5 Other - Absent Parent Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.97.6 Other - Absent Parent Panel Accessibility

6.97.6.1 To Access the Other - Absent Parent Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Select Absent Parent.	Absent Parent panel displays.

6.97.6.2 To Add on the Other - Absent Parent Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Absent Parent Last Name.	
3	Enter Absent Parent First Name and Middle Initial.	
4	Enter **Date of Birth** in MM/DD/CCYY format.	
5	Select **Military Status** from drop down list.	
6	Select **Military Branch** from drop down list.	
7	Enter Absent Parent SSN.	
8	Enter **Sex**.	
9	Enter **Absent Parent Country**. Note: Search field is available if Country code is unknown.	
10	Enter Absent Parent Address 1.	
11	Enter Absent Parent Address 2.	
12	Enter Absent Parent City.	
13	Select **Absent Parent State** from drop down list.	
14	Enter Absent Parent Zip Code + 4.	
15	Click **Save**.	Absent Parent information is saved.

6.97.6.3 To Update on the Other - Absent Parent Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	

3	Click **Save**.	Absent Parent information is saved.

6.97.6.4 To Delete on the Other - Absent Parent Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.98 Other - Absent Parent to Employer Xref Panel Overview

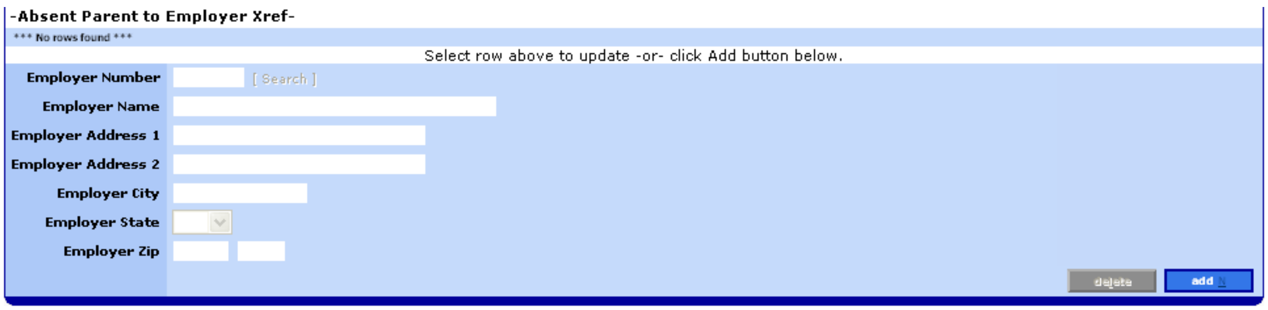
6.98.1 Other - Absent Parent to Employer Xref Panel Narrative

The Absent Parent to Employer Xref panel displays the absent parent and related employer data.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Other] - [Absent Parent] - [Employer Xref]

6.98.2 Other - Absent Parent to Employer Xref Panel Layout



6.98.3 Other - Absent Parent to Employer Xref Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Absent Parent to Employer Xref panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Employer Address 1	This is the street address of an employer.	Field	Character	55
Employer Address 2	This is the second street address of an employer.	Field	Character	55
Employer City	This is the city of an employer.	Field	Character	30
Employer Name	This is the business name of an employer.	Field	Character	39
Employer Number	This field is the unique, user-defined employer identification number used on all screens and reports to identify the employer.	Field	Character	7
Employer State	This is the state of an employer.	Field	Character	2
Employer Zip	This is the first 5 digits of the zip code of an employer.	Field	Number (Integer)	15
Employer Zip + 4	This is the last 4 digits of the zip code of an employer.	Field	Number (Integer)	4

6.98.4 Other - Absent Parent to Employer Xref Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Employer Number	Field	1001	A valid Employer is required.	Enter or search for a valid employer.

6.98.5 Other - Absent Parent to Employer Xref Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.98.6 Other - Absent Parent to Employer Xref Panel Accessibility

6.98.6.1 To Access the Other - Absent Parent to Employer Xref Panel

Step	Action	Response
1	Enter **User Name** and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Select Absent Parent.	Absent Parent panel displays.
5	Click Employer Xref.	Absent Parent to Employer Xref panel displays.

6.98.6.2 To Add on the Other - Absent Parent to Employer Xref Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Employer Number.	
3	Enter Employer Name.	
4	Enter Employer Address 1.	
5	Enter Employer Address 2.	
6	Enter Employer City.	
7	Select **Employer State** from drop down list.	
8	Enter Employer Zip Code + 4.	
9	Click **Save**.	Absent Parent to Employer Xref panel information is saved.

6.98.6.3 To Update on the Other - Absent Parent to Employer Xref Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.

2	Click in desired field to update and perform update.	
3	Click **Save**.	Absent Parent to Employer Xref panel displays.

6.98.6.4 To Delete on the Other - Absent Parent to Employer Xref Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

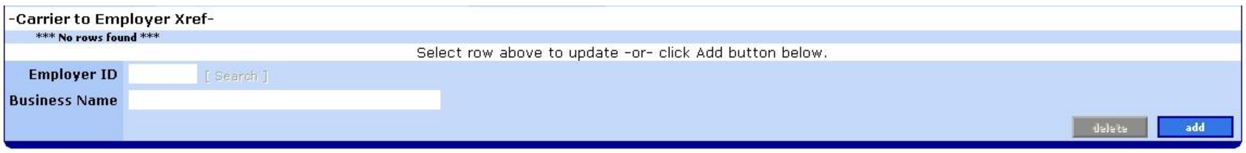
6.99 Other - Carrier to Employer Xref Panel Overview

6.99.1 Other - Carrier to Employer Xref Panel Narrative

The Carrier to Employer Xref panel is used to establish a relationship between an Employer and a Carrier. This relationship is used to support documenting Employer sponsored health coverage.

Navigation Path: [TPL] – [Related Data] - [Other] - [Carrier] - [Employer Xref]

6.99.2 Other - Carrier to Employer Xref Panel Layout



6.99.3 Other - Carrier to Employer Xref Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Carrier to Employer Xref panel.	Button	N/A	0
Business Name	The business name of an employer.	Field	Character	39
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Employer ID	Unique, user-defined employer identification number which is used on all screens and reports to identify the employer.	Field	Character	7

6.99.4 Other - Carrier to Employer Xref Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.99.5 Other - Carrier to Employer Xref Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.99.6 Other - Carrier to Employer Xref Panel Accessibility

6.99.6.1 To Access the Other - Carrier to Employer Xref Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Select **Carrier**.	Carrier panel displays.
5	Click Employer Xref.	Carrier to Employer Xref panel displays.

6.99.6.2 To Add on the Other - Carrier to Employer Xref Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Employer ID. If unknown, click on [Search] button to locate by selecting from a list of results.	Business Name automatically prefills when Employer ID is entered.
3	Click **Save**.	Carrier to Employer Xref panel information is saved.

6.99.6.3 To Update on the Other - Carrier to Employer Xref Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Carrier to Employer Xref panel information is updated.

6.99.6.4 To Delete on the Other - Carrier to Employer Xref Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

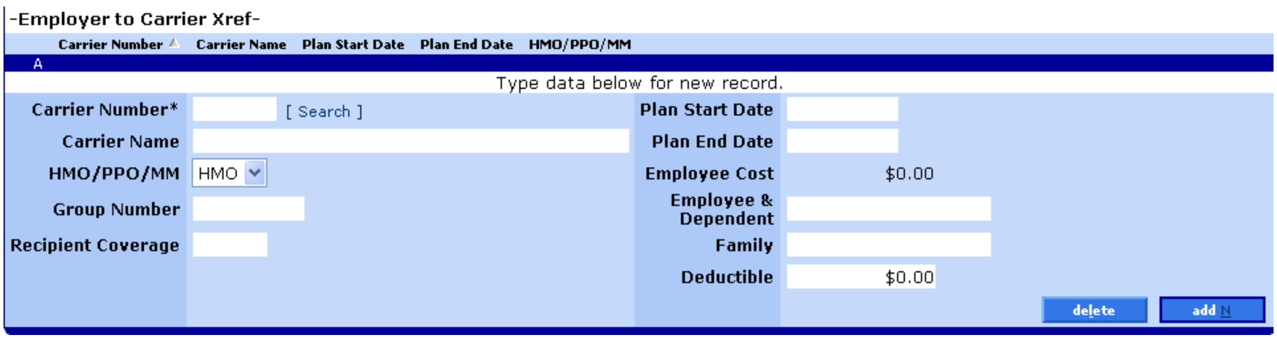
6.100 Other - Employer to Carrier Xref Panel Overview

6.100.1 Other - Employer to Carrier Xref Panel Narrative

The Employer to Carrier Xref panel is used to establish a relationship between an Employer and a Carrier. This relationship is used to support documenting Employer sponsored health coverage.

Navigation Path: [TPL] – [Related Data] - [Other] - [Employer] - [Carrier Xref]

6.100.2 Other - Employer to Carrier Xref Panel Layout



6.100.3 Other - Employer to Carrier Xref Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Employer to Carrier Xref panel.	Button	N/A	0
Carrier Name	This field contains the business name of an insurance carrier. This allows us to access all insurance carrier information when the carrier gives us only his business name.	Field	Character	45
Carrier Number	The system assigned key for the TPL other insurance carrier. It uniquely identifies the carrier internally to the system. Each carrier also has a user-defined carrier identification number used on all screens and reports.	Field	Character	7
Deductible	The employee's deductible with the employer sponsored health plan with the carrier.	Field	Number (Decimal)	9
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Employee & Dependent	The employee's cost for employee and dependent for the employer sponsored health plan with the carrier.	Field	Number (Decimal)	9
Employee Cost	The employee's cost for the employer sponsored health plan with the carrier.	Field	Number (Decimal)	9

Field	Description	Field Type	Data Type	Length
Family	The employee's cost for family for the employer sponsored health plan with the carrier.	Field	Number (Decimal)	9
Group Number	The group number of the employer sponsored health plan with the carrier.	Field	Character	30
HMO/PPO/MM	This code identifies whether a TPL carrier is an HMO or PPO.	Field	Drop Down List Box	0
Plan End Date	Date the employer sponsored plan with the carrier ends.	Field	Date (MM/DD/CCYY)	10
Plan Start Date	Date the employer sponsored plan with the carrier starts.	Field	Date (MM/DD/CCYY)	10
Recipient Coverage	The coverage level codes. Valid values include: I = Individual E = Employee Only F = Employee + Family C = Employee + Children (default) S = Employee + Spouse O = Other 1= Employee + 1	Field	Drop Down List Box	0

6.100.4 Other - Employer to Carrier Xref Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.100.5 Other - Employer to Carrier Xref Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.100.6 Other - Employer to Carrier Xref Panel Accessibility

6.100.6.1 To Access the Other - Employer to Carrier Xref Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.

Step	Action	Response
4	Select **Employer**.	Employer panel displays.
5	Click Carrier Xref.	Employer to Carrier Xref panel displays.

6.100.6.2 To Add on the Other - Employer to Carrier Xref Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Carrier Number.	
3	Enter Carrier Name.	
4	Select **HMO/PPO/MM** from drop down list.	
5	Enter Group Number.	
6	Enter Recipient Coverage.	
7	Enter **Plan Start Date** in MM/DD/CCYY format.	
8	Enter **Plan End Date** in MM/DD/CCYY format.	
9	Enter Employee & Dependent.	
10	Enter **Family**.	
11	Enter Deductible.	
12	Click **Save**.	Employer to Carrier Xref panel information is saved.

6.100.6.3 To Update on the Other - Employer to Carrier Xref Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Employer to Carrier Xref panel information is updated.

6.100.6.4 To Delete on the Other - Employer to Carrier Xref Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.101 Other - Attorney Panel Overview

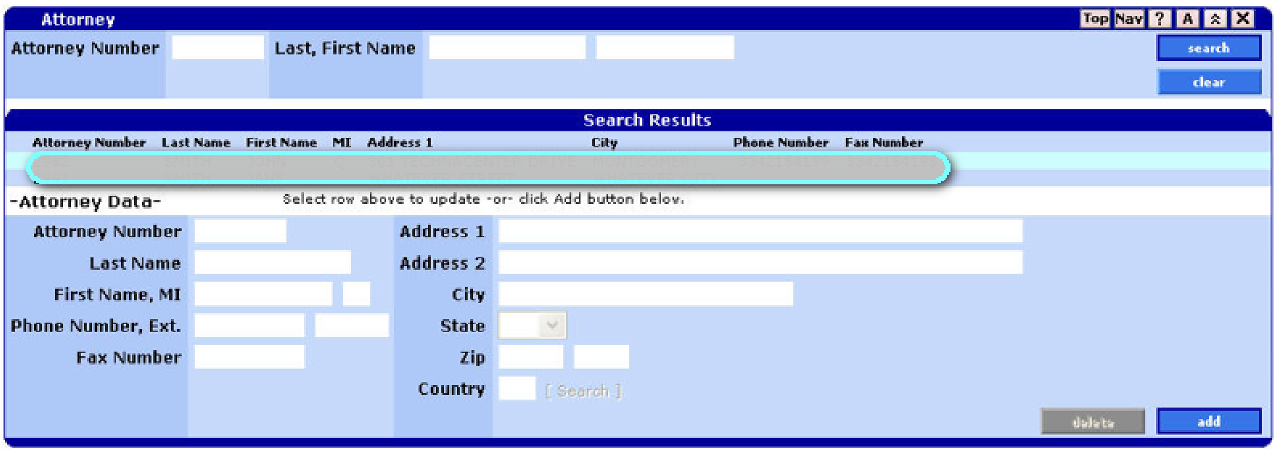
6.101.1 Other - Attorney Panel Narrative

The Attorney panel is used to search, display and update attorney information. The user has the ability to enter the attorney number, attorney name or a combination of the two fields to view the attorneys on the database.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Other] - [Attorney]

6.101.2 Other - Attorney Panel Layout



6.101.3 Other - Attorney Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Attorney panel.	Button	N/A	0
Address 1	This is the first line of the street address for the attorney.	Field	Character	55
Address 2	This is the second line of the street address for the attorney.	Field	Character	55
Attorney Number	This is a unique identifier assigned to each attorney.	Field	Character	8
City	The city where the attorney resides.	Field	Character	30
Clear	Clear current search criteria.	Button	N/A	0
Countr	The country where the attorney resides.	Field	Character	2
Delete	Allows a user to remove a record from the data list.	Button	N/A	0

Field	Description	Field Type	Data Type	Lengt h
Fax Number	This is the United States or international fax number for the attorney.	Field	Number (Integer)	10
First Name, MI	This is the first name and middle initial of the attorney.	Field	Character	14
Last Name	The last name of the attorney.	Field	Character	15
Phone Number, Ext.	This is the US or international phone number plus the phone extension of the attorney.	Field	Number (Integer)	16
Search	Search for a record in the datalist.	Button	N/A	0
State	This is the state code where attorney resides.	Combo Box	Drop Down List Box	0
Zip	This is the first 5 digits and the last 4 digits of the zip code for the attorney if within the US. Zip can also be an international zip code.	Field	Number (Integer)	9

6.101.4 Other - Attorney Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Address 1	Field	0	Address 1 is required.	Enter Address 1.
City	Field	0	City is Required.	Enter a City.
Country	Field	1	Country is required.	Select a valid country value.
Fax Number	Field	1	Enter a valid value.	Enter a valid fax number.
	Field	2	Fax Number must be 10 numeric values.	If country is US, fax number must be 10 numeric values.
Last, First Name, MI	Field	0	Last Name is required.	Enter last name.
	Field	1	First Name is required.	Enter first name.
Phone Number	Field	1	Enter a valid value.	Enter a valid phone number.
	Field	2	Phone Number must be 10 numeric values.	If country is US, phone number must be 10 numeric values.
State	Field	1	A valid State is required.	Select value for state.
Zip	Field	1	Zip is required.	Enter a zip code.
	Field	2	Enter a valid value.	Enter a zip code.
	Field	3	Zip code must be 5 numeric values.	If country is US, zip code must be 5 numeric values.

6.101.5 Other - Attorney Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.101.6 Other - Attorney Panel Accessibility

6.101.6.1 To Access the Other - Attorney Panel

Step	Action	Response
1	Enter **User Name** and Password; Click **Login**.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
5	Click Attorney.	Attorney panel displays.

6.101.6.2 To Add on the Other - Attorney Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Attorney Number.	
3	Enter Last Name.	
4	Enter First Name, MI.	
5	Enter Phone Number, Ext.	
6	Enter Fax Number.	
7	Enter Address 1.	
8	Enter Address 2.	
9	Enter **City**.	
10	Select **State** from drop down list.	
11	Enter Zip Code +4.	
12	Enter **Country**. Note: Use Search button if country code is unknown.	
13	Click **Save**.	Attorney panel information is saved.

6.101.6.3 To Update on the Other - Attorney Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.

Step	Action	Response
2	Click in desired field to update and perform update.	
3	Click **Save**.	Attorney panel information is updated.

6.101.6.4 To Delete on the Other - Attorney Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.102 Other - Attorney Firm Panel Overview

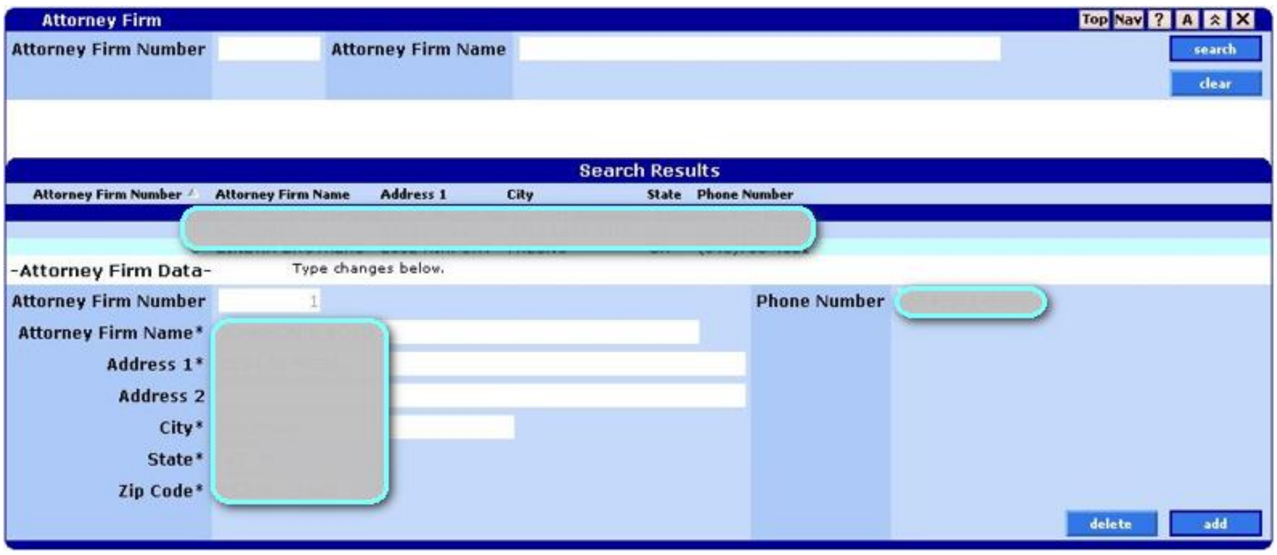
6.102.1 Other - Attorney Firm Panel Narrative

The Attorney Firm panel is used to add, update or delete an Attorney Firm Name.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Other] - [Attorney Firm]

6.102.2 Other - Attorney Firm Panel Layout



6.102.3 Other - Attorney Firm Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Attorney Firm panel.	Button	N/A	0
Address 1	The first address line of the attorney firm.	Field	Character	30
Address 2	The second address line of the attorney firm.	Field	Character	30
Attorney Firm Name	The name of the attorney firm.	Field	Character	35
Attorney Firm Number	The firm number of the attorney firm.	Field	Number (Integer)	9
City	The city in which the attorney firm is located.	Field	Character	15
Clear	Clears the current search criteria.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
Phone Number	The phone number of the attorney firm.	Field	Number (Integer)	13
Search	Searches datalist for attorney firm name and number.	Button	N/A	0
State	The state in which the attorney firm is located.	Combo Box	Drop Down List Box	0
Zip Code	The zip and the zip +4 of the attorney firm.	Field	Number (Integer)	9

6.102.4 Other - Attorney Firm Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Address 1	Field	1000	Address 1 is required.	Enter an address.
Attorney Firm Name	Field	1000	Attorney Firm name is required.	Enter an Attorney Firm Name.
City	Field	1000	City is required.	Enter a valid City.
State	Field	1000	A valid State is required.	Select a value for State.
Zip Code	Field	1000	Zip is required.	Enter a Zip.
	Field	1001	Enter a valid value.	Zip code is numeric only.

6.102.5 Other - Attorney Firm Panel Extra Features

The Attorney Firm panel allows the deletion of records after a referential check is performed to ensure the record is not being utilized.

6.102.6 Other - Attorney Firm Panel Accessibility

6.102.6.1 To Access the Other - Attorney Firm Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click Attorney Firm.	Attorney Firm panel displays.

6.102.6.2 To Add on the Other - Attorney Firm Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Attorney Number.	
3	Enter Last Name.	
4	Enter First Name, MI.	
5	Enter Phone Number, Ext.	
6	Enter Fax Number.	
7	Enter Address 1.	
8	Enter Address 2.	
9	Enter **City**.	
10	Select **State** from drop down list.	
11	Enter Zip Code +4.	
12	Enter **Country**. Note: Use Search button if country code is unknown.	
13	Click **Save**.	Attorney Firm panel information is saved.

6.102.6.3 To Update on the Other - Attorney Firm Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Attorney Firm panel information is updated.

6.102.6.4 To Delete on the Other - Attorney Firm Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.103 Other - Carrier Panel Overview

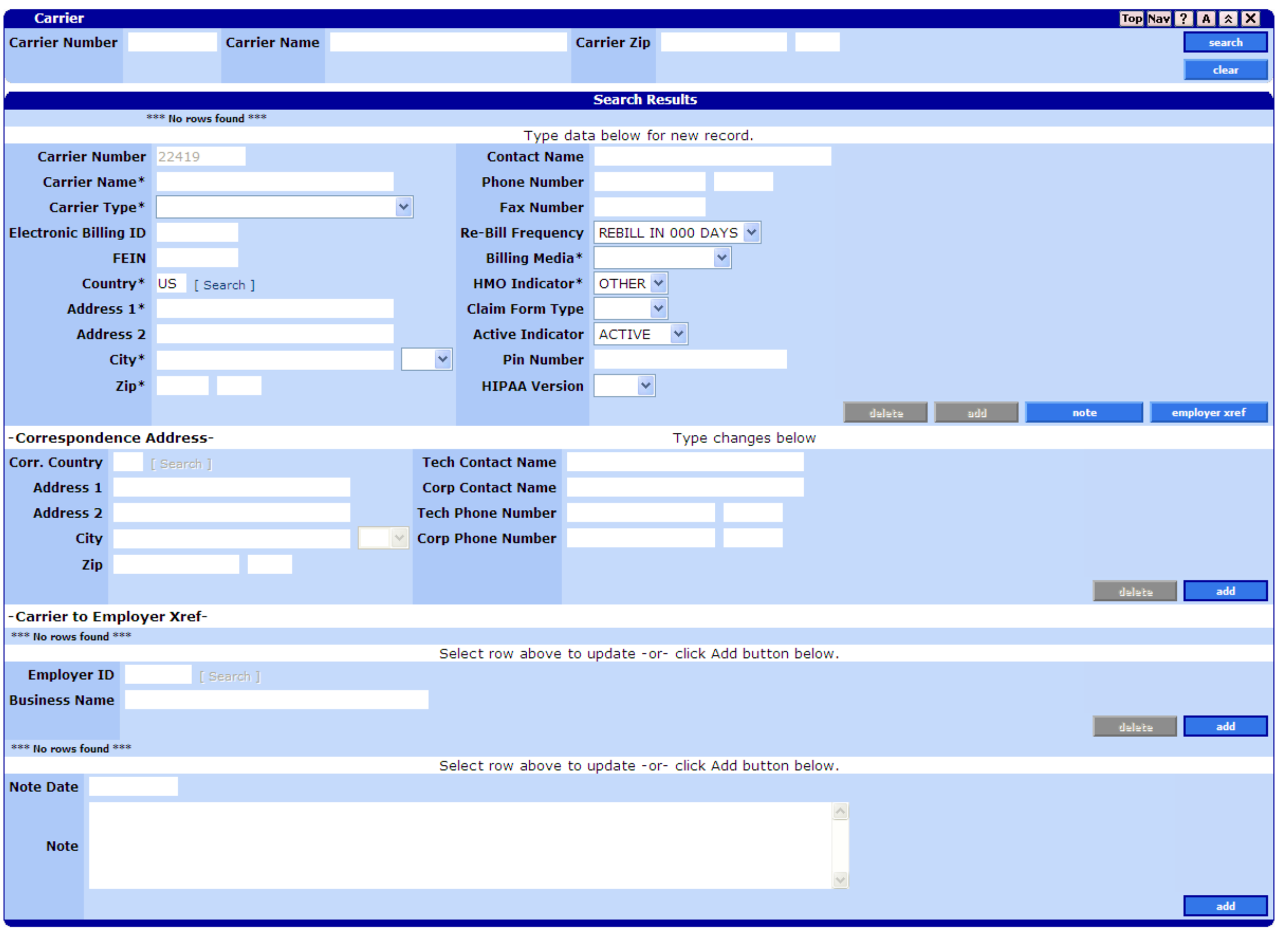
6.103.1 Other - Carrier Panel Narrative

The Carrier panel contains information about other insurance companies that may have issued policies which cover Medicaid recipients. In addition, correspondence address data, notes, and a cross-reference between the carrier and employer can also be maintained on this panel. The claim submission address is used for all claim facsimile billings. A separate correspondence address (if different than the claim submission address) is maintained within a separate section on this panel. The correspondence address is used for all non-facsimile correspondence but is not used by financial. The contact name is used to address all questions concerning the policy and carrier.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Other] - [Carrier]

6.103.2 Other - Carrier Panel Layout



6.103.3 Other - Carrier Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Active Indicator	Indicates if the carrier is active or inactive.	Combo Box	Drop Down List Box	0
Add	Allows a user to add a new record on the Other – Carrier panel.	Button	N/A	0
Address 1	This is the street address for the claim submission address of a carrier. It is used for mailing TPL claim facsimiles.	Field	Character	30
Address 2	This is the second street address for the claim submission address of a carrier. It is used for mailing TPL claim facsimiles.	Field	Character	30
Billing Media	This field provides a detailed description of its associated billing media code.	Combo Box	Drop Down List Box	0
Carrier Name	This field contains the business name of an insurance carrier. This allows us to access all insurance carrier information when the carrier gives us only his business name.	Field	Character	45
Carrier Number	This is the system assigned key for the TPL other insurance carrier. It uniquely identifies the carrier internally to the system. Each carrier also has a user-defined carrier identification number used on all screens and reports.	Field	Number (Integer)	7
Carrier Type	This is the code for the carrier type.	Combo Box	Drop Down List Box	0
Carrier Zip	This is the zip code for the carrier.	Field	Number (Integer)	5
Carrier Zip +4	The last four digits of the zip code for correspondence with a carrier.	Field	Number (Integer)	4
City	This is the city for the claim submission address of a carrier. It is used for mailing TPL claim facsimiles.	Field	Character	15
Claim Form Type	This field is the claim form description associated with a claim form type code.	Combo Box	Drop Down List Box	0
Clear	Clears fields of data.	Button	N/A	0
Contact Name	This is the name of the carrier contact when there are questions about a policy or the carrier.	Field	Character	40
Country	Two character country abbreviation.	Combo Box	Drop Down List Box	0

Field	Description	Field Type	Data Type	Length
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Electronic Billing ID	This is the electronic billing identification for the carrier.	Field	Number (Integer)	9
Employer Xref	Opens the Other - Carrier to Employer Xref panel.	Button	N/A	0
Fax Number	The fax number for the carrier in the format area code + prefix + suffix if within the US. Could be an out of country fax number if country code is not US.	Field	Number (Integer)	15
FEIN	This is the Federal Employer Identification Number (FEIN).	Field	Number (Integer)	9
HIPAA Version	HIPAA format the insurance carrier will accept, 4010 or 5010.	Combo Box	Character	4
HMO Indicator	This field contains the description associated with a specific HMO indicator code.	Combo Box	Drop Down List Box	0
Note	Opens the carrier chronological notes panel.	Button	N/A	0
Phone Number	This is the telephone number of the carrier contact.	Field	Character	10
Pin Number	This is the personal identification number for the carrier’s electronic billing.	Field	Number (Integer)	10
Rebill Frequency	This is the carrier billing frequency, in days.	Combo Box	Drop Down List Box	0
Search	Invokes search on Attorney Number or Attorney Name.	Button	N/A	0
State	This is the state for the claim submission address of a carrier. It is used for mailing TPL claim facsimiles.	Combo Box	Drop Down List Box	0
Zip	This is the first 5 digits of the zip code for the claim submission address of a carrier. It is used for mailing TPL claim facsimiles.	Field	Number (Integer)	5
Zip + 4	This is the zip code + 4 for the carrier.	Field	Number (Integer)	4
Corresponding Address				
Address 1	The street address for correspondence with a TPL carrier.	Field	Character	30
Address 2	The second street address for correspondence with a TPL carrier.	Field	Character	30
City	The city for correspondence with a carrier.	Field	Character	15

Field	Description	Field Type	Data Type	Length
Corp Contact Name	The name of the corporate contact when there are questions about a policy or the carrier.	Field	Character	40
Corp Phone Number	The telephone number of the corporate contact.	Field	Number (Integer)	10
Corp Phone Number Ext.	The extension number of the corporate contact.	Field	Number (Integer)	4
Corr. Country	This code described the country, and determines whether International or Domestic style addresses are displayed.	Combo Box	Character	2
Delete	Deletes current record.	Button	N/A	0
Tech Contact Name	The name of the technical contact when there are technical questions for the carrier.	Field	Character	40
Tech Phone Number	The telephone number of the technical contact.	Field	Number (Integer)	10
Tech Phone Number Ext.	The extension number of the technical contact.	Field	Number (Integer)	4
Zip	The first five digits of the zip code for correspondence with a carrier.	Field	Number (Integer)	5
Zip + 4	The last four digits of the zip code for correspondence with a carrier.	Field	Number (Integer)	4
Carrier to Employer Xref				
Add	Allows a user to add a new record on the Other – Carrier to Employer Xref panel.	Button	N/A	0
Business Name	The business name of an employer.	Field	Character	39
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Employer ID	Unique, user-defined employer identification number which is used on all screens and reports to identify the employer.	Field	Character	7
Note				
Add	Allows a user to add a new note.	Button	N/A	0
Note	A free-form text field for notes regarding the carrier.	Field	Character	500
Note Date	The date the note was added.	Field	N/A	0

6.103.4 Other - Carrier Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Active Indicator	Field	1001	Active indicator should be set to Active for Carriers with active Policy records.	Remove the carrier from any policies before setting indicator to inactive.
Address 1	Field	1	Address 1 is required.	Enter a valid Address 1.
	Field	2	Corresponding Address 1 is required.	Enter Correspondence Address.
Billing Media	Field	1	A valid Billing Media is required.	Select a Billing Media from the list.
Carrier Name	Field	1	Carrier Name is required.	Enter a Carrier Name.
Carrier Number	Field	1	Carrier Number is required.	Enter a valid Carrier Number.
City	Field	1	City is required.	Enter a valid City.
	Field	2	Corresponding City is required.	Enter Corresponding City.
Delete	Button	1001	Cannot delete Carrier. Carrier exists in one or more Casualty Cases.	Remove Carrier from Casualty Cases before attempting to delete Carrier.
	Button	1002	Cannot delete Carrier. Carrier exists on one or more TPL Policies.	Remove Carrier from policies before attempting to delete Carrier.
	Button	1003	Cannot delete Carrier. Carrier exists in one or more HIPP cases as Payment Entity.	Remove Carrier from HIPP Cases before attempting to delete Carrier.
	Button	1004	Cannot delete Carrier. Carrier exists in one or more TPL AR Cases.	Remove Carrier from AR Cases before attempting to delete Carrier.
	Button	1005	Cannot delete Carrier. Carrier exists in one or more HIPP Cases.	Remove carrier from HIPP Cases before attempting to delete Carrier.
Employer ID	Field	1	A valid TPL Employer ID is required.	Enter valid Employer ID.
HMO Indicator	Field	1	A valid HMO Indicator is required.	Select a HMO Indicator from the list.
Note	Field	1	Note is required.	Add note.
State	Field	1	A valid State is required.	Enter a valid State.
	Field	2	A valid Corresponding State is required.	Enter Correspondence State.
Zip	Field	1	Zip is required.	Enter a Valid Zip.
	Field	2	Corresponding Zip is required.	Enter Correspondence Zip Code.

6.103.5 Other - Carrier Panel Extra Features

Referential integrity checks are applied when attempting deletes. A carrier cannot be deleted if it is associated with any of the following:

- Policy- AR
- Case tracking
- HIPP case

If a user changes the carrier name, address, phone numbers, or fax number and the carrier exists on a HIPP case, the panel will update the address data on the t_hipp_resource, which can then be viewed on the HIPP Payment Entity Panel.

6.103.6 Other - Carrier Panel Accessibility

6.103.6.1 To Access the Other – Carrier Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click **Carrier**.	Carrier panel displays.

6.103.6.2 To Add on the Other - Carrier Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Carrier Number**.	
3	Enter **Carrier Name**.	
4	Select **Carrier Type** from drop down list.	
5	Enter **Electronic Billing ID**.	
6	Enter **FEIN**.	
7	Enter **Country**. Note: Use Search button if country code is unknown.	
8	Enter **Address 1**.	
9	Enter **Address 2**.	
10	Enter **City**.	
11	Select **State** from drop down list.	
12	Enter **Zip Code +4**.	

Step	Action	Response
13	Enter **Contact Name**.	
14	Enter **Phone Number**.	
15	Enter **Extension**.	
16	Select **Re-Bill Frequency** from drop down list.	
17	Select **Billing Media** from drop down list.	
18	Select **HMO Indicator** from drop down list.	
19	Select **Claim Form Type** from drop down list.	
20	Select **Active Indicator** from drop down list.	
21	Enter **PIN Number**.	
22	Click **Save**.	Carrier panel information is saved.

6.103.6.3 To Update on the Other - Carrier Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Carrier panel information is updated.

6.103.6.4 To Delete on the Other - Carrier Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

5.103.1 Other - Carrier Panel (Correspondence Address) Accessibility

5.103.1.1 To Access the Other – Carrier Panel (Correspondence Address)

Step	Action	Response
1	Enter **User Name** and **Password**; Click **Login**.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click **Carrier**.	Carrier panel displays.
5	Click **Add** on Carrier panel.	Correspondence Address display

5.103.1.2 To Add on the Other – Carrier Panel (Correspondence Address)

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	**Corr. Country** defaults to US.	
3	Enter **Address1**.	
4	Enter **Address 2**.	
5	Enter **City**.	
6	Select **State** from the drop down box.	
7	Enter **Zip Code**.	
8	Enter **Zip+4**.	
9	Enter **Tech Contact Name**.	
10	Enter **Corp Contact Name**.	
11	Enter **Tech Phone Number**.	
12	Enter **Corp Phone Number**.	
13	Click **Save**.	Corresponding Address is Saved.

5.103.1.3 To Update on the Other - Carrier Panel (Correspondence Address)

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Carrier panel information is updated.

5.103.1.4 To Delete on the Other - Carrier Panel (Correspondence Address)

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

5.103.2 Other - Carrier Panel (Carrier to Employer Xref) Accessibility

5.103.2.1 To Access the Other – Carrier Panel (Carrier to Employer Xref)

Step	Action	Response
1	Enter **User Name** and **Password**; Click **Login**.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.

Step	Action	Response
4	Click **Carrier**.	Carrier panel displays.
5	Click **Employer Xref** button.	Carrier to Employer Xref panel displays.

5.103.2.2 To Add on the Other – Carrier Panel (Carrier to Employer Xref)

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Employer ID**. If unknown, click on [Search] button to locate by selecting from a list of results.	Business Name automatically prefills when Employer ID is entered.
3	Click **Save**.	Corresponding Address is Saved.

5.103.2.3 To Update on the Other - Carrier Panel (Carrier to Employer Xref)

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Carrier to Employer Xref panel information is updated.

5.103.2.4 To Delete on the Other - Carrier Panel (Carrier to Employer Xref)

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

5.103.3 Other - Carrier Panel (Note) Accessibility

5.103.3.1 To Access the Other – Carrier Panel (Note)

Step	Action	Response
1	Enter **User Name** and **Password**; Click **Login**.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click **Carrier**.	Carrier panel displays.
5	Click **note** button.	Note panel displays.

5.103.3.2 To Add on the Other – Carrier Panel (Note)

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Note**.	
3	Click **Save**.	Note is Saved.

5.103.3.3 To Update on the Other - Carrier Panel (Note)

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Carrier to Employer Xref panel information is updated.

5.103.3.4 To Delete on the Other - Carrier Panel (Note)

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.104 Other - Case Executor Trustee Info Panel Overview

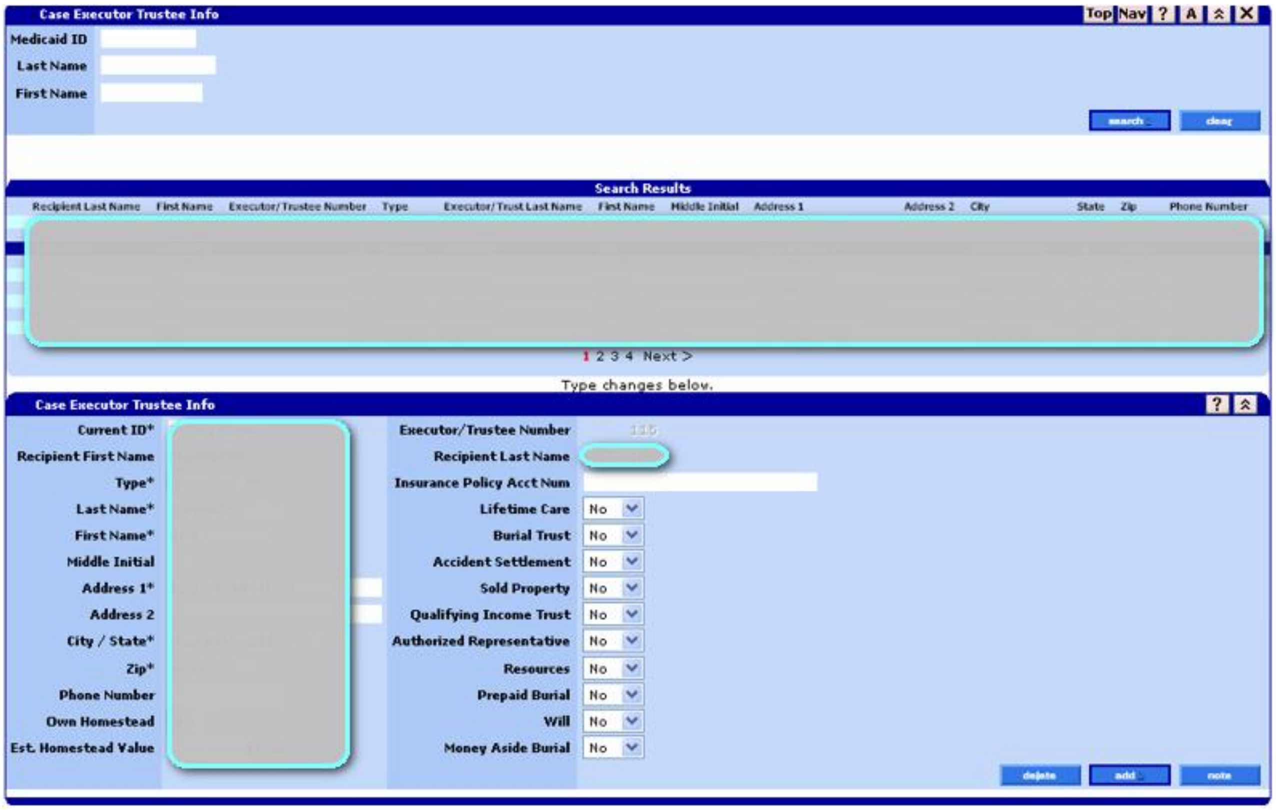
6.104.1 Other - Case Executor Trustee Info Panel Narrative

The Case Executor Trustee Info panel displays case information.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Other] - [Case Executor Trustee Info]

6.104.2 Other - Case Executor Trustee Info Panel Layout



6.104.3 Other - Case Executor Trustee Info Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Accident Settlement	Accident settlement indicator.	Combo Box	Drop Down List Box	0
Add	Allows a user to add a new record on the Other – Case Executor Trustee Info panel.	Button	N/A	0
Address1	The first address line of the Executor/Trustee.	Field	Character	55

Field	Description	Field Type	Data Type	Length
Address2	The second address line for the Executor/Trustee.	Field	Character	55
Authorized Representative	Authorized representative indicator.	Combo Box	Drop Down List Box	0
Burial Trust	Burial trust indicator.	Combo Box	Drop Down List Box	0
City/State	This is the Executor/Trustee’s city and state.	Field	Character	32
Clear	Clear search criteria.	Button	N/A	0
Current ID	The recipient's current Medicaid identification number.	Label	Character	12
Delete	Delete the case information detail.	Button	N/A	0
Est. Homestead Value	The estimated homestead value.	Field	Number (Decimal)	9
Executor/Trust Last Name	Last name of the executor/trustee.	Field	Character	20
Executor/Trustee Number	Unique identifier assigned to each Trustee.	Field	Character	9
First Name	First name of the executor/trustee.	Field	Character	15
Insurance Policy Acct Num	The account number for the insurance policy.	Field	Character	30
Lifetime Care	Lifetime care indicator.	Combo Box	Drop Down List Box	0
Middle Initial	Middle initial of the executor/trustee.	Field	Character	1
Money Aside Burial	Money set aside for burial indicator.	Combo Box	Drop Down List Box	0
Note	Opens the Notes panel	Button	N/A	0
Own Homestead	This is the Executor/Trustee's own homestead.	Combo Box	Drop Down List Box	0
Phone Number	This is the Executor/Trustee's phone.	Field	Number (Integer)	10
Prepaid Burial	Prepaid burial indicator.	Combo Box	Drop Down List Box	0
Qualifying Income Trust	Qualifying income trust indicator.	Combo Box	Drop Down List Box	0
Recipient First Name	The first name of a recipient.	Field	Character	15
Recipient Last Name	The last name of a recipient.	Field	Character	20

Field	Description	Field Type	Data Type	Length
Resources	Resources indicator.	Combo Box	Drop Down List Box	0
Search	Start search for case information.	Button	N/A	0
Sold Property	Sold property indicator.	Combo Box	Drop Down List Box	0
Type	Executor or Trustee type.	Combo Box	Drop Down List Box	0
Will	Indicates if there is will. Valid values are: Yes and No.	Combo Box	Drop Down List Box	0
Zip	The nine digits Executor/Trustee's zip code for correspondence with a carrier.	Field	Character	9

6.104.4 Other - Case Executor Trustee Info Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Address1	Field	1	Address 1 is required.	Enter executor or trustee address.
City	Field	1	City is required.	Enter a value for City.
State	Field	1	State is required.	Select a State from drop down list.
Type	Field	1	Type is required.	Select a Type from drop down list.
Zip	Field	1	Zip is required.	Enter a value for Zip Code.
	Field	2	Data must be numeric.	Enter a numeric value for Zip Code.

6.104.5 Other - Case Executor Trustee Info Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.104.6 Other - Case Executor Trustee Info Panel Accessibility

6.104.6.1 To Access the Other – Case Executor Trustee Info Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click Case Information.	Case Executor Trustee Info panel displays.

6.104.6.2 To Add on the Other - Case Executor Trustee Info Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Recipient Medicaid ID.	
3	Enter Recipient First Name.	
4	Enter Executor/Trustee Number.	
5	Select **Type** from the drop down list box.	
6	Enter Executor/Trustee Last Name.	
7	Enter First Name.	
8	Enter Middle Initial.	
9	Enter Address 1.	
10	Enter Address 2.	
11	Enter **City**.	
12	Select **State** from drop down list.	
13	Enter Zip Code +4.	
14	Enter Phone Number.	
15	Select **Own Homestead** from drop down list.	
16	Enter Est. Homestead Value.	
17	Enter Recipient Last Name.	
18	Enter Insurance Policy Acct Num.	
19	Select **Lifetime Care** from drop down list.	
20	Select **Burial Trust** from drop down list.	
21	Select **Accident Settlement** from drop down list.	
22	Select **Sold Property** from drop down list.	
23	Select **Qualifying Income Trust** from drop down list.	
24	Select **Authorized Representative** from drop down list.	
25	Select **Resources** from drop down list.	
26	Select **Prepaid Burial** from drop down list.	
27	Select **Will** from drop down list.	
28	Select **Money Aside Burial** from drop down list.	

Step	Action	Response
29	Click **Save**.	Case Executor Trustee Info panel information is saved.

6.104.6.3 To Update on the Other - Case Executor Trustee Info Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Case Executor Trustee Info panel information is updated.

6.104.6.4 To Delete on the Other - Case Executor Trustee Info Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.105 Other - Correspondence Address Panel Overview

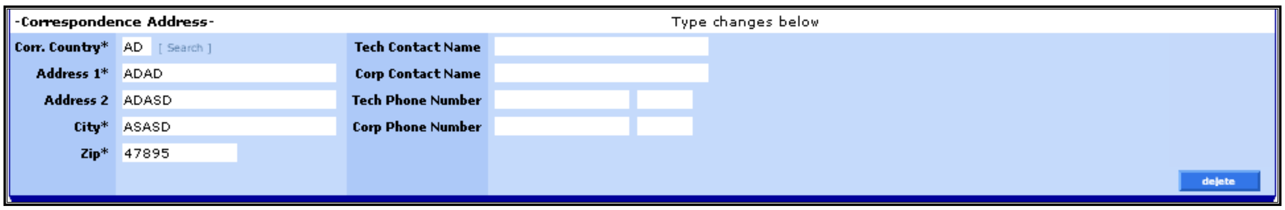
6.105.1 Other - Correspondence Address Panel Narrative

The Correspondence Address panel contains information about the other insurance company's mailing address if it is different than the billing address.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] - [Related Data] - [Other] - [Carrier] - [Search] - [Select a record].

6.105.2 Other - Correspondence Address Panel Layout



6.105.3 Other - Correspondence Address Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Address 1	The street address for correspondence with a TPL carrier.	Field	Character	30
Address 2	The second street address for correspondence with a TPL carrier.	Field	Character	30
City	The city for correspondence with a carrier.	Field	Character	15
Corp Contact Name	The name of the corporate contact when there are questions about a policy or the carrier.	Field	Character	40
Corp Phone Number	The telephone number of the corporate contact.	Field	Number (Integer)	10
Corp Phone Number Ext.	The extension number of the corporate contact.	Field	Number (Integer)	4
Corr. Country	This code described the country, and determines whether International or Domestic style addresses are displayed.	Combo Box	Character	2
Delete	Deletes current record.	Button	N/A	0
Tech Contact Name	The name of the technical contact when there are technical questions for the carrier.	Field	Character	40
Tech Phone Number	The telephone number of the technical contact.	Field	Number (Integer)	10

Field	Description	Field Type	Data Type	Length
Tech Phone Number Ext.	The extension number of the technical contact.	Field	Number (Integer)	4
Zip	The first five digits of the zip code for correspondence with a carrier.	Field	Number (Integer)	5
Zip + 4	The last four digits of the zip code for correspondence with a carrier.	Field	Number (Integer)	4

6.105.4 Other - Correspondence Address Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Address 1	Field	1	Address1 is required.	Enter an Address1.
City	Field	1	City is required.	Enter a City.
Zip	Field	1	Zip is required.	Enter a Zip Code.

6.105.5 Other - Correspondence Address Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.105.6 Other - Correspondence Address Panel Accessibility

6.105.6.1 To Access the Other – Correspondence Address Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data.**	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click **Carrier**.	Correspondence Address panel displays.
5	Select **Search**.	Search results display.
6	Click on desired row.	Correspondence Address panel displays at the bottom.

6.105.6.2 To Update on the Other - Correspondence Address Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Correspondence Address panel information is updated.

6.105.6.3 To Delete on the Other - Correspondence Address Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.106 Other - Employer Panel Overview

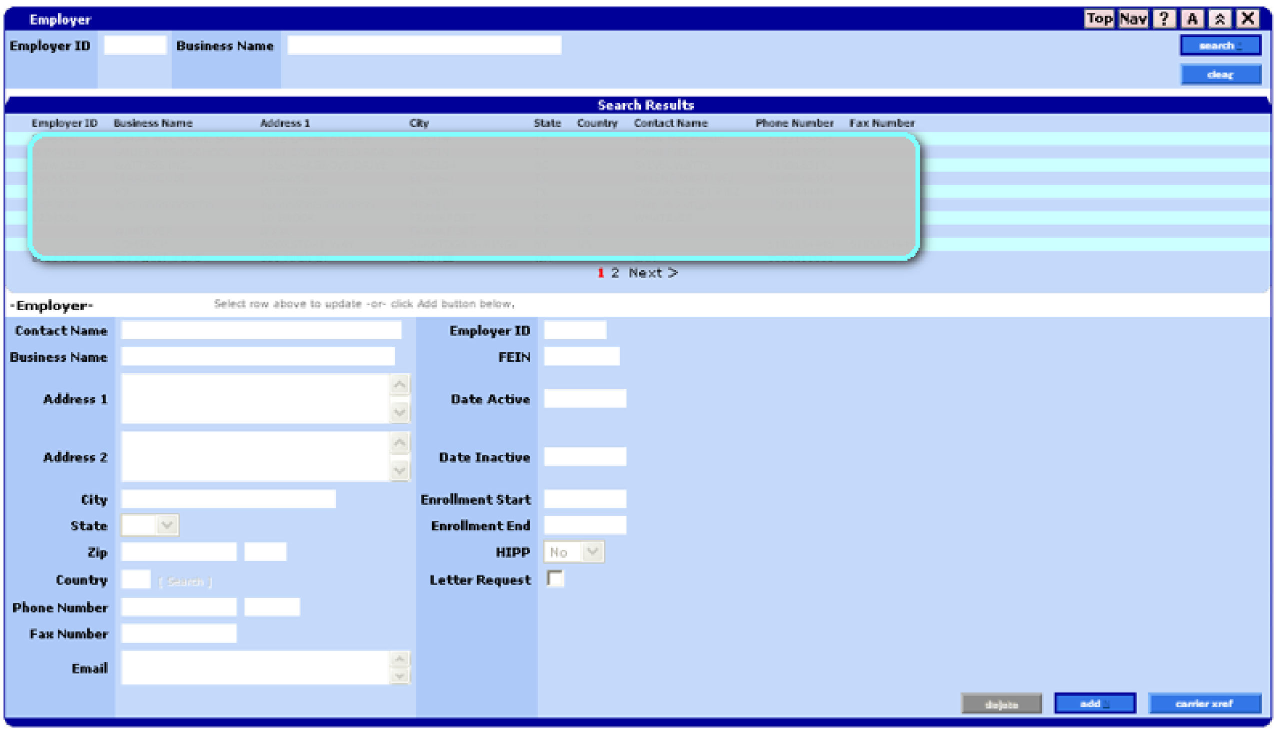
6.106.1 Other - Employer Panel Narrative

The Employer panel is used to search, display and update employer information. The user has the ability to enter the employer ID, business name or a combination of the two fields to view the employers on the database.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Other] - [Employer]

6.106.2 Other-Employer Panel Layout



6.106.3 Other - Employer Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Employer panel.	Button	N/A	0
Address 1	The street address of an employer.	Field	Character	30
Address 2	The second street address of an employer.	Field	Character	30
Business Name	The business name of an employer.	Field	Character	39

Field	Description	Field Type	Data Type	Length
Carrier Xref	Link to the Carrier Xref. Panel.	Button	N/A	0
City	The city of an employer.	Field	Character	15
Clear	Clears fields of data.	Button	N/A	0
Contact Name	The employer contact name.	Field	Character	40
Country	The country code in which the employer resides.	Field	Character	2
Date Active	The date in which the employer record becomes active.	Field	Date (MM/DD/CCYY)	10
Date Inactive	The date in which the employer record is inactive.	Field	Date (MM/DD/CCYY)	10
Delete	Deletes current record.	Button	N/A	0
Email	The email address of the contact person with the employer.	Field	Character	15
Employer ID	Non-unique, user-defined employer identification number used on all screens and reports to identify the employer.	Field	Character	7
Enrollment End	The employer's end date for enrollment.	Field	Date (MM/DD/CCYY)	8
Enrollment Start	The employer's enrollment date for insurance coverage.	Field	Date (MM/DD/CCYY)	8
Extension	The employer contact telephone extension.	Field	Number (Integer)	4
Fax Number	The fax number for the employer, and is not a required field.	Field	Number (Integer)	10
FEIN	The Federal Employer Identification Number (FEIN).	Field	Character	9
HIPP	Indicates whether Health Insurance Premiums are paid for the employer group plans.	Field	Drop Down List Box	0
Letter Request	Indicates whether the user wants to request the TPL Employer Letter.	Field	Checkbox	0
Phone Number	The employer contact telephone number.	Field	Number (Integer)	10
Search	Invokes search on Employer identification number or Business Name.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
State	The state of the insurance agent where correspondence, cover letters, and liens are sent to.	Combo Box	Drop Down List Box	0
Zip 1	The first 5 digits of the zip code of an employer.	Field	Number (Integer)	5
Zip 2	The last four characters of the zip code of the employer.	Field	Number (Integer)	4

6.106.4 Other - Employer Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Carrier Xref	Button	1	A valid TPL Employer Carrier Xref is required.	Add a Employer to Carrier Xref record.
Address 1	Field	1	Address 1 is required.	Enter an Address 1.
Business Name	Field	1	Business Name is required.	Must enter a valid value for business name.
City	Field	1	City is required.	Enter a City.
Contact Name	Field	1	Contact Name is required.	Enter a Contact Name.
Delete	Button	1	Invalid Delete - Employer has Carrier Data.	Cannot delete Employer while carrier data still on file. Carrier data for this employer must be deleted first.
	Button	2	Invalid Delete - Employer has TPL Resource Data.	Can not delete Employer while TPL resource data still on file. TPL resource data for this employer must be deleted first.
Employer ID	Field	1	Employer ID must be 7 character(s) in length.	Enter a valid Employer ID.
FEIN	Field	1	FEIN is required.	Enter a valid FEIN.
Phone Number (1)	Field	1	Phone Number is required.	Enter a Phone Number.
	Field	2	Enter a valid value.	Phone Number is numeric only.
	Field	3	Phone Number must be 10 character(s) in length.	Enter a Phone Number with 10 Characters.
State	Field	1	A valid State is required.	Select a State value.
Zip 1	Field	1	Zip is required.	Enter a Zip.
	Field	2	Enter a valid value.	Zip is numeric only.

Field	Field Type	Error Code	Error Message	To Correct
Zip 2	Field	1	Enter a valid value.	Zip (2) is numeric only.

6.106.5 Other - Employer Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.106.6 Other - Employer Panel Accessibility

6.106.6.1 To Access the Other – Employer Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click Employer.	Employer panel displays.

6.106.6.2 To Navigate on the Other – Employer Panel

Step	Action	Response
1	Enter Employer ID or Business Name.	
2	Click **Search**.	Employer information is displayed.

6.106.6.3 To Add on the Other - Employer Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Contact Name.	
3	Enter Business Name.	
4	Enter Address 1.	
5	Enter Address 2.	
6	Enter **City**.	
7	Select **State** from drop down list.	
8	Enter Zip Code +4.	
9	Enter **Country**. Note: Selection defaults to US.	
10	Enter Phone Number.	

Step	Action	Response
11	Enter Fax Number.	
12	Enter **Email**.	
13	Enter Employer ID.	
14	Enter **FEIN**.	
15	Enter **Date Active** in MM/DD/CCYY format.	
16	Enter **Date Inactive** in MM/DD/CCYY format.	
17	Enter **Enrollment Start** in MM/DD/CCYY format.	
18	Enter **Enrollment End** in MM/DD/CCYY format.	
19	Select **HIPP** from drop down list.	
20	Check **Letter Request** box, if applicable.	
21	Click **Save**.	Employer panel information is saved.

6.106.6.4 To Update on the Other - Employer Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Employer panel information is updated.

6.106.6.5 To Delete on the Other - Employer Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.107 Other - Insurance Agent Panel Overview

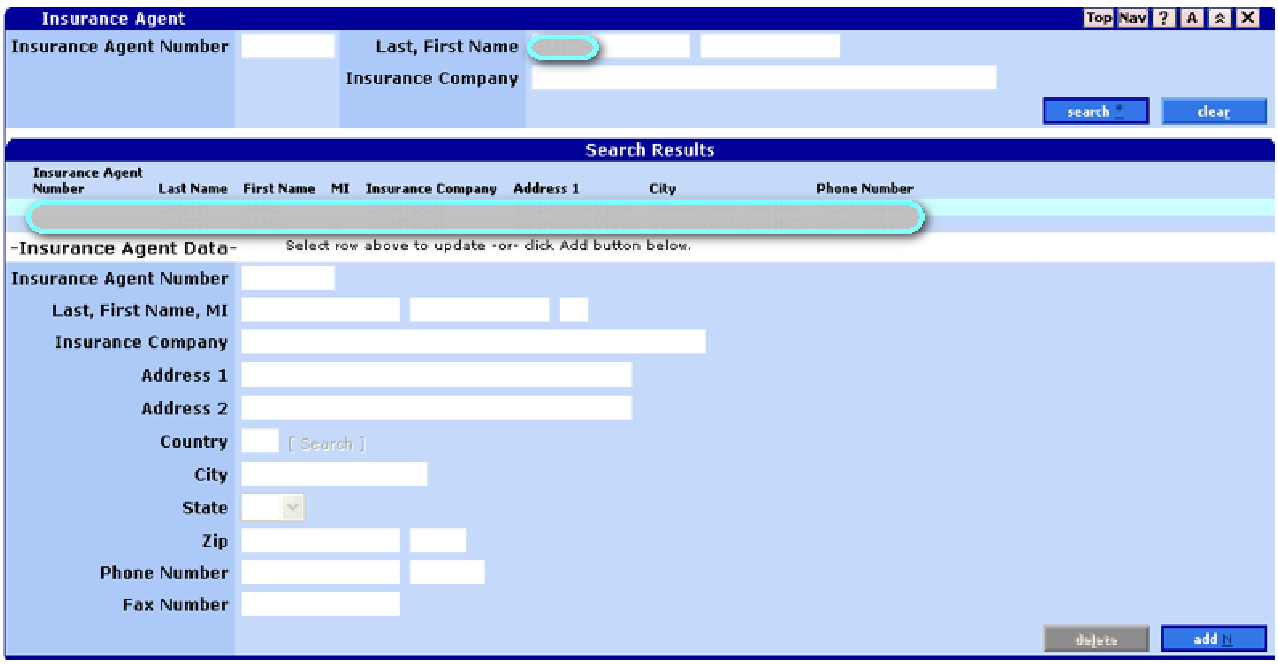
6.107.1 Other - Insurance Agent Panel Narrative

The Insurance Agent panel is used to add, update and view information on a certain insurance agent or insurance company.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Other] - [Insurance Agent]

6.107.2 Other - Insurance Agent Panel Layout



6.107.3 Other - Insurance Agent Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Insurance Agent panel.	Button	N/A	0
Address 1	The first street address of the insurance agent where the correspondence, cover letters, and liens are sent to.	Field	Character	30
Address 2	The second street address of the insurance agent where the correspondence, cover letters and liens are sent to.	Field	Character	30

Field	Description	Field Type	Data Type	Length
City	The city of the insurance agent where correspondence, cover letters, and liens are sent to.	Field	Character	15
Clear	Clears fields of data.	Button	N/A	0
Country	The country where the insurance agent resides.	Field	Character	2
Delete	Deletes current record.	Button	N/A	0
Extension Number	The extension number for the insurance agent.	Field	Number (Integer)	6
Fax Number	This is a fax number in the format area code + prefix + suffix.	Field	Number (Integer)	10
Insurance Agent Number	Unique identifier assigned to each Insurance Agent.	Field	Number (Integer)	8
Insurance Company	The company that the insurance agent is employed by.	Field	Character	40
Last, First Name, MI	The insurance agent's last name, first name and middle initial used to mail correspondence, cover letters, and liens.	Field	Character	30
Phone Number	The phone number where the insurance agent can be reached.	Field	Number (Integer)	10
Search	Invokes search on Insurance Agent Number, Agent Name or Insurance Company.	Button	N/A	0
State	The state of the insurance agent where correspondence, cover letters, and liens are sent to.	Combo Box	Drop Down List Box	0
Zip	The insurance agent's zip code where the correspondence, cover letters and liens are sent to including the last four characters of the zip code of the insurance agent used for the correspondence.	Field	Number (Integer)	9

6.107.4 Other - Insurance Agent Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Address 1	Field	1	Address 1 is required.	Must enter a valid value for Address 1.
City	Field	1	City is required.	Must enter a valid value for City.
Country	Field	1	Country is required.	Select a Country value.
Fax Number	Field	1	Enter a valid value.	Fax Number is numeric only.
	Field	2	Fax Number must be 10 character(s) in length.	If country is US, enter a Fax Number with 10 Characters.
	Field	3	Fax Number needs to be ten numeric values.	Enter ten valid numeric values.
Insurance Agent Name	Field	1	Last Name is required.	Enter a Last Name.
	Field	2	First Name is required.	Enter a First Name.
Phone Number	Field	1	Enter a valid value.	Phone Number is numeric only.
	Field	2	Phone Number must be 10 character(s) in length.	If country is US, enter a phone number with 10 characters.
Zip 1	Field	1	Enter a valid value.	Zip (1) is numeric only.
	Field	2	Zip is required.	Must enter a valid value for Zip.
Zip 2	Field	1	Enter a valid value.	Zip (2) is a valid value.

6.107.5 Other - Insurance Agent Panel Extra Features

Referential integrity checks are applied when attempting deletes. An insurance agent cannot be deleted if associated with a case tracking record.

6.107.6 Other - Insurance Agent Panel Accessibility

6.107.6.1 To Access the Other – Insurance Agent Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click Insurance Agent.	Insurance Agent panel displays.

6.107.6.2 To Navigate on the Other - Insurance Agent Panel

Step	Action	Response
1	Enter Insurance Agent Number, Last, First Name or Insurance Company.	
2	Click **Search**.	Insurance Agent information is populated in fields.

6.107.6.3 To Add on the Other – Insurance Agent Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Insurance Agent Number.	
3	Enter Last, First Name, MI.	
4	Enter Insurance Company.	
5	Enter Address 1.	
6	Enter Address 2.	
7	Enter **Country**. Note: Selection defaults to US.	
8	Enter **City**.	
9	Select **State** from drop down list.	
10	Enter Zip Code +4.	
11	Enter Phone Number.	
12	Enter Fax Number.	
13	Click **Save**.	Insurance Agent information is saved.

6.107.6.4 To Update on the Other – Insurance Agent Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Insurance Agent panel information is updated.

6.107.6.5 To Delete on the Other – Insurance Agent Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.108 Other - Letter Tracking Panel Overview

6.108.1 Other - Letter Tracking Panel Narrative

The Letter Tracking panel allows the user to view the history and/or update the received date for the following letters:

TPL Accident Trauma Questionnaire (Batch)

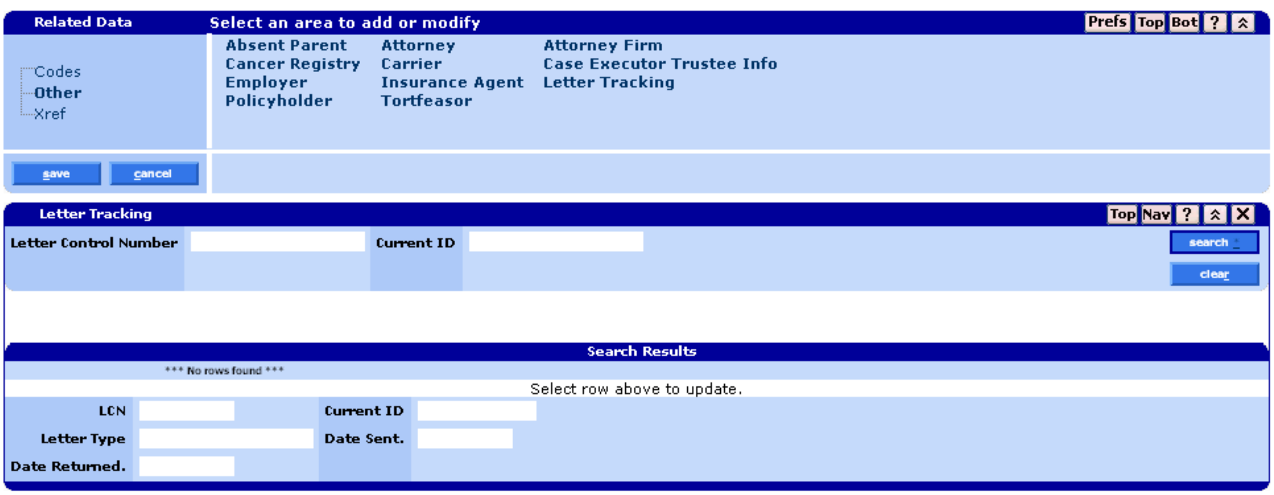
TPL Recipient Questionnaire (Batch)

TPL Absent Parent Employer Letter

TPL Absent Parent Insurance Verification Letter

Only authorized users are allowed to perform maintenance tasks on this panel.

6.108.2 Other - Letter Tracking Panel Layout



6.108.3 Other - Letter Tracking Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Cancel	Allows the user to cancel any changes.	Button	N/A	0
Clear	This button allows the user to clear the information within all letter tracking fields.	Button	N/A	0
Current ID	The recipient's current Medicaid identification number.	Label	Character	12

Field	Description	Field Type	Data Type	Length
Date Returned	The date a response was received from the letter.	Field	Date (MM/DD/CCYY)	8
Date Sent	The date the letter was generated.	Field	Date (MM/DD/CCYY)	8
Letter Control Number (LCN)	The bar coded letter control number assigned to each letter.	Field	Character	12
Letter Type	The type of letter that was sent.	Field	Character	1
Save	Allows the user to save a record.	Button	N/A	0
Search	Invokes search on Recipient ID, Letter Control Number or Date Sent.	Button	N/A	0

6.108.4 Other - Letter Tracking Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Current ID	Field	1	Please enter at least one search field.	Enter search criteria.
Date Returned	Field	1	Date Returned is required.	Date returned is required.
Letter Control Number	Field	1	Please enter at least one search field.	Enter search criteria.

6.108.5 Other - Letter Tracking Panel Extra Features

Referential integrity checks are applied when attempting deletes. A policyholder cannot be deleted if it is associated with any of the following:

- Policy (active or inactive)
- HIPP case (active or inactive)

6.108.6 Other - Letter Tracking Panel Accessibility

6.108.6.1 To Access the Other – Letter Tracking Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click Letter Tracking.	Letter Tracking panel displays.

6.108.6.2 To Navigate on the Other - Letter Tracking Panel

Step	Action	Response
1	Enter Letter Control Number or Date Sent. Note: User must enter one search field.	
2	Click **Search**.	Letter Tracking information displays.

6.108.6.3 To Update on the Other – Letter Tracking Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Letter Tracking panel information is updated.

6.109 Other - Nasco Policy Prefixes Panel Overview

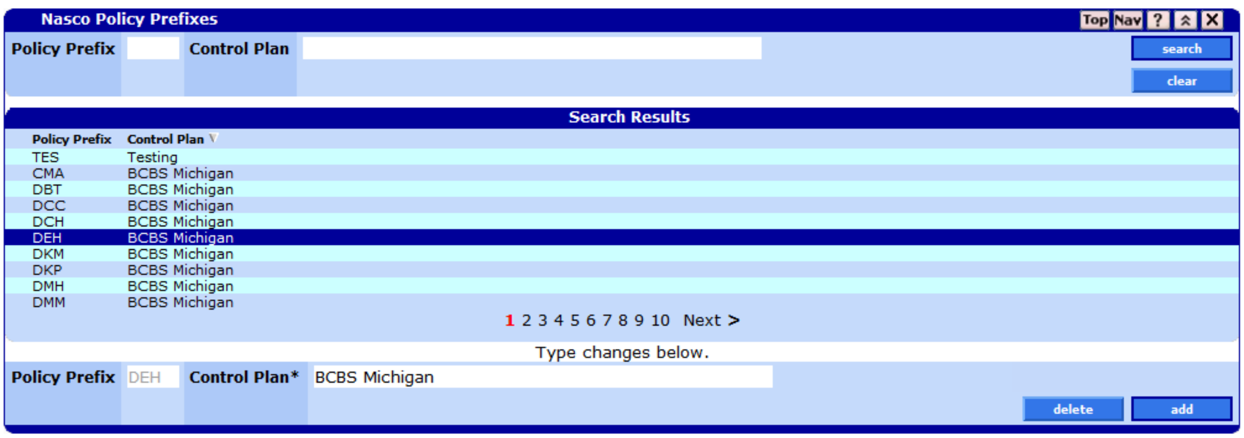
6.109.1 Other - Nasco Policy Prefixes Panel Narrative

The NASCO prefixes panel contains the list of policy prefixes that need to be excluded from the TPL Billing processes. Prefixes can be added or removed.the Control plan is the only modifiable field.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Other] - [Nasco Policy Prefixes]

6.109.2 Other - Nasco Policy Prefixes Panel Layout



6.109.3 Other - Nasco Policy Prefixes Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Nasco Policy Prefixes panel.	Button	N/A	0
Clear	Clears fields of data.	Button	N/A	0
Control Plan	Description of the BCBS Control plan the prefix belongs.	Field	Character	50
Delete	Delete current record.	Button	N/A	0
Search	Invokes search on Policy Prefix or Control Plan.	Button	N/A	0
Policy Prefix	Stores the TPL policy prefix.	Field	Character	3

6.109.4 Other - Nasco Policy Prefixes Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Control Plan	Field	1	Control Plan is required.	Enter a Control Plan.
Policy Prefix	Field	1	Policy Prefix is required.	Enter a Policy Prefix.
	Field	2	Duplicate record cannot be saved.	Enter the valid record.
	Field	3	Policy prefix should atleast contain one character (A - Z).	Policy prefix should atleast contain one character (A - Z).
	Field	4	Policy Prefix must be Alphanumeric.	Policy Prefix must be Alphanumeric.
	Field	5	Policy Prefix must be 3 characters in length	Policy Prefix must be 3 characters in length.

6.109.5 Other - Nasco Policy Prefixes Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.109.6 Other - Nasco Policy Prefixes Panel Accessibility

6.109.6.1 To Access the Other - Nasco Policy Prefixes Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click **Nasco Policy Prefixes**.	Nasco Policy Prefixes panel displays.

6.109.6.2 To Add on the Other - Nasco Policy Prefixes Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter **Policy Prefix**.	
3	Enter **Control Plan**.	
12	Click **Save**.	Nasco Policy Prefixes panel information is saved.

6.109.6.3 To Update on the Other - Nasco Policy Prefixes Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Nasco Policy Prefixes panel information is updated.

6.109.6.4 To Delete on the Other - Nasco Policy Prefixes Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.110 Other - Policyholder Panel Overview

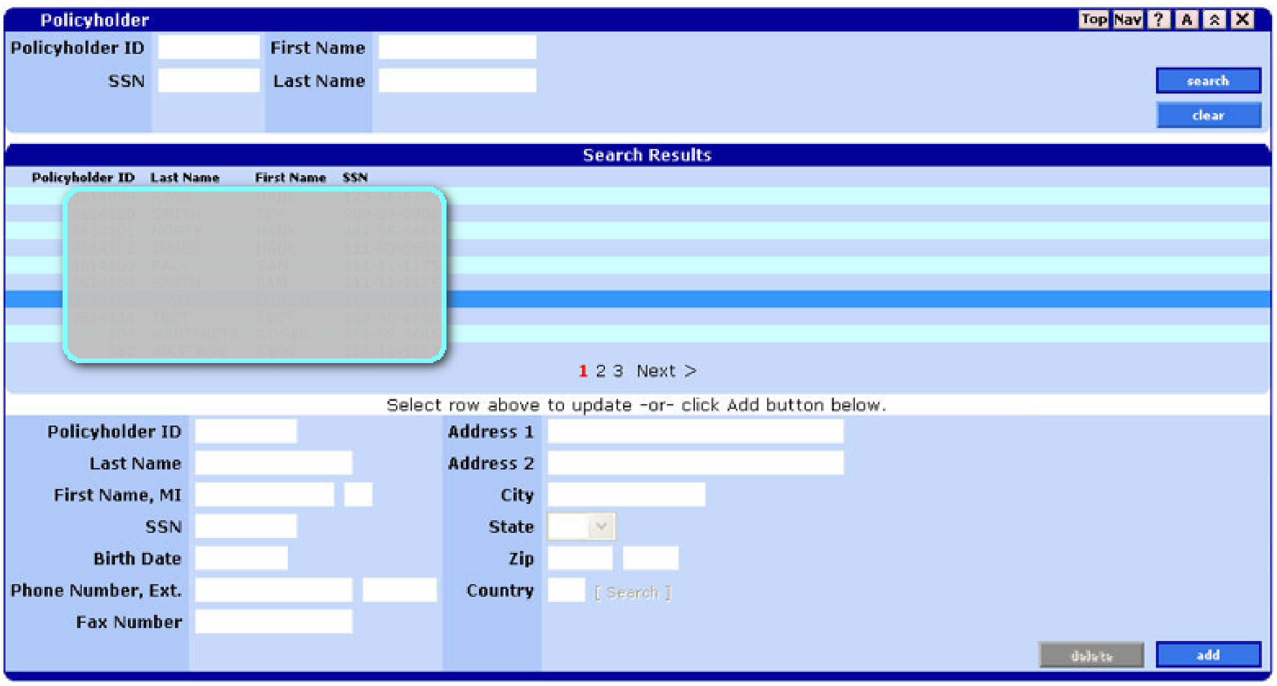
6.110.1 Other - Policyholder Panel Narrative

The Policyholder panel contains information about the non-Medicaid policyholder of a policy. A policyholder may hold a policy which covers multiple recipients. Keeping this data on a separate table allows it to be maintained once instead of for each recipient covered by the policy. If the policyholder is also a recipient, the policyholder data is obtained from the recipient table; no policyholder record is created.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Other] - [Policyholder]

6.110.2 Other - Policyholder Panel Layout



6.110.3 Other - Policyholder Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Policyholder panel.	Button	N/A	0
Address 1	The street address of the policyholder. It is used to send correspondence to the policyholder.	Field	Character	30

Field	Description	Field Type	Data Type	Length
Address 2	The second street address of the policyholder. It is used to send correspondence to the policyholder.	Field	Character	30
Birth Date	Birth date of the policy holder.	Field	Date (MM/DD/CCYY)	8
City	The city of the policyholder. It is used to send correspondence to the policyholder.	Field	Character	15
Clear	Clears fields of data.	Button	N/A	0
Country	Country code of the policy holder.	Field	Number (Integer)	2
Delete	Deletes current record.	Button	N/A	0
Fax Number	Fax number of the policy holder.	Field	Number (Integer)	15
First Name, MI	The first name and middle initial of the policyholder. It is used to send correspondence to the policyholder.	Field	Character	13
Last Name	The last name of the policyholder. It is used to send correspondence to the policyholder.	Field	Character	15
Phone Number, Ext.	Phone Number and Extension of Policy Holder.	Field	Number (Integer)	15
Policyholder ID	The system assigned key for the TPL policyholder. This key is used to uniquely identify the policyholder internally to the system and is also used on all screens and reports as Policyholder identification number.	Field	Number (Integer)	9
Search	Invokes search on Policyholder information.	Button	N/A	0
SSN	The Social Security Number of the policyholder.	Field	Number (Integer)	9
State	The state of the policyholder. It is used to send correspondence to the policyholder.	Combo Box	Drop Down List Box	0
Zip	The first 5 digits of the zip code of the policyholder. It is used to send correspondence to the policyholder.	Field	Number (Integer)	5
Zip + 4	The last 4 digits of the zip code of the policyholder. It is used to send correspondence to the policyholder.	Field	Number (Integer)	4

6.110.4 Other - Policyholder Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Address 1	Field	1	Address 1 is required.	Enter an Address 1.
Birth Date	Field	1	Enter a valid Birth Date.	Birth Date must be 8 characters.
City	Field	1	City is required.	Enter a City.
Country	Field	1	Country code is invalid.	Enter a valid Country code.
Fax Number	Field	1	Enter a valid value.	Fax number is numeric only.
First Name	Field	1	First Name is required.	Enter a First Name.
Last Name	Field	1	Last Name is required.	Enter a Last Name.
Phone Number Extension	Field	1	Enter a valid value.	Phone number is numeric only.
Phone Number, Ext	Field	1	Enter a valid value.	Phone Number is numeric only.
SSN	Field	1	SSN Number is required.	Enter an SSN.
State	Field	1	A valid State is required.	Select a value for State.
Zip	Field	1	Mail Zip is required.	Enter a Zip.
	Field	2	Mail Zip must be 5 character(s) in length.	Enter a valid value.
Zip + 4	Field	1	Must be 4 character(s) in length.	Enter a valid value.

6.110.5 Other - Policyholder Panel Extra Features

Referential integrity checks are applied when a delete is attempted.

6.110.6 Other - Policyholder Panel Accessibility

6.110.6.1 To Access the Other – Policyholder Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click Policyholder.	Policyholder panel displays.

6.110.6.2 To Add on the Other – Policyholder Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Policyholder ID.	
3	Enter Last Name.	
4	Enter First Name, MI.	
5	Enter **SSN**.	
6	Enter Birthdate.	
7	Enter **Phone Number** and extension.	
8	Enter Fax Number.	
9	Enter Address 1.	
10	Enter Address 2.	
11	Enter **City**.	
12	Select **State** from drop down list box.	
13	Enter Zip Code +4.	
14	Enter **Country**. Note: Selection defaults to US. Select [Search] if unknown.	
15	Click **Save**.	Policyholder information is saved.

6.110.6.3 To Update on the Other – Policyholder Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Policyholder panel information is updated.

6.110.6.4 To Delete on the Other – Policyholder Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.111 Other - Tortfeasor Panel Overview

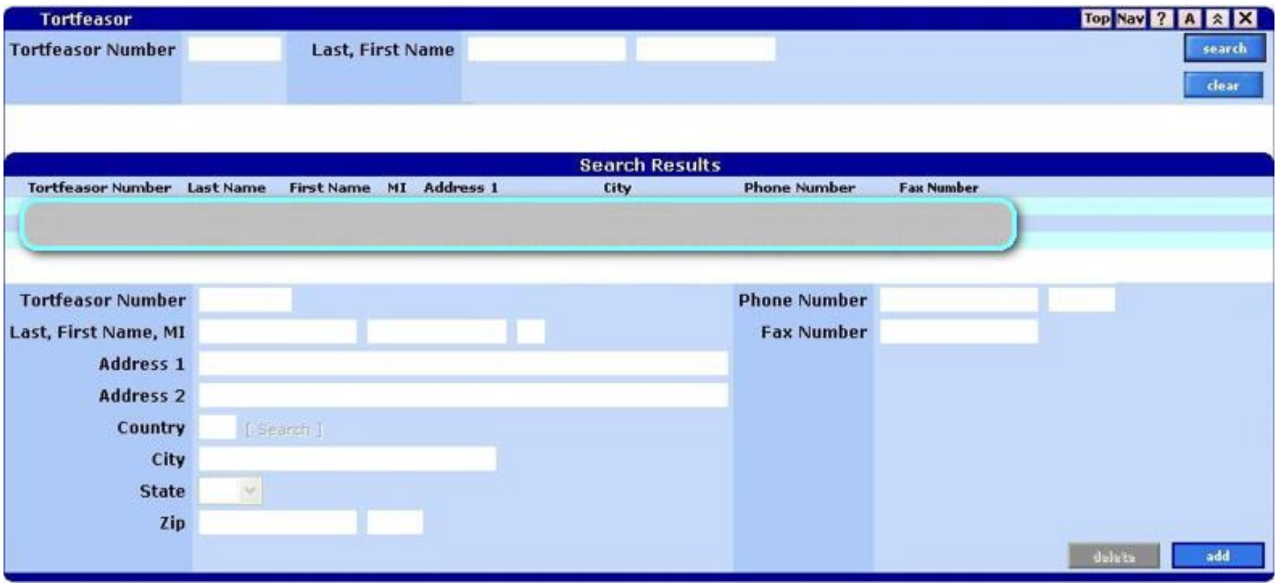
6.111.1 Other - Tortfeasor Panel Narrative

The Tortfeasor panel contains information about the person who is liable for the case. This information is used to send liens, letters and to receive payments.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Other] - [Tortfeasor]

6.111.2 Other - Tortfeasor Panel Layout



6.111.3 Other - Tortfeasor Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Other – Tortfeasor panel.	Button	N/A	0
Address 1	The first street address of the tortfeasor's where the correspondence, cover letters, and liens are sent.	Field	Character	55
Address 2	The second street address of the tortfeasor's where the correspondence, cover letters, and liens are sent.	Field	Character	55
City	The city of the tortfeasor where the correspondence, cover letters, and liens are sent.	Field	Character	30
Clear	Clears fields of data.	Button	N/A	0

Field	Description	Field Type	Data Type	Lengt h
Country	The country where the tortfeasor resides.	Field	Character	2
Delete	Deletes current record.	Button	N/A	0
Extension Number	The extension number for the Tortfeasor phone number.	Field	Number (Integer)	6
Fax Number	The fax number for the tortfeasor. It can be an international number.	Field	Number (Integer)	10
Last, First Name, MI	The last name, first name and middle initial of the tortfeasor used to address the correspondence, cover letters, and liens.	Field	Character	29
Last, First Name [Search]	The last and first name of the tortfeasor used to address the correspondence, cover letters, and liens.	Field	Character	28
Phone Number	The phone number where the tortfeasor can be reached.	Field	Number (Integer)	10
Search	Invokes search on Tortfeasor Number or Tortfeasor Name.	Button	N/A	0
State	The state where the tortfeasor's correspondence, cover letters, and liens are sent.	Combo Box	Drop Down List Box	0
Tortfeasor Number	The account assigned number of the tortfeasor.	Field	Number (Integer)	8
Zip 1	The tortfeasor's zip code where the correspondence, cover letters, and liens are sent.	Field	Number (Integer)	9

6.111.4 Other - Tortfeasor Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Address 1	Field	1	Address 1 is required.	Enter an Address 1.
City	Field	1	City is required.	Enter a City.
Country	Field	1	A valid Country is required.	Select a valid Country value.
Fax Number	Field	1	Fax Number must be 10 character(s) in length.	If country is US, enter a Fax Number with 10 characters.
	Field	2	Fax Number is not valid.	Enter a valid value.
Last, First Name, MI	Field	1	Last Name is required.	Enter a Last Name.
	Field	2	First Name is required.	Enter a First Name.
Phone Number	Field	1	Phone Number is not valid.	Enter a valid Phone Number.

Field	Field Type	Error Code	Error Message	To Correct
	Field	2	Phone Number must be 10 character(s) in length.	If country is US, enter a Phone Number with 10 characters.
Zip 1	Field	1	Zip is required.	Enter a Zip Code.
	Field	2	Zip is not valid.	Enter a valid value.
	Field	3	Zip Code4 is not valid.	Enter a valid value.

6.111.5 Other - Tortfeasor Panel Extra Features

Referential integrity checks are applied when attempting deletes. A tortfeasor cannot be deleted if associated with a case tracking record.

6.111.6 Other - Tortfeasor Panel Accessibility

6.111.6.1 To Access the Other - Tortfeasor Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Other** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click Tortfeasor.	Tortfeasor panel displays.

6.111.6.2 To Add on the Other - Tortfeasor Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Tortfeasor Number.	
3	Enter Last, First Name, MI.	
4	Enter Address 1.	
5	Enter Address 2.	
6	Enter **Country**. Note: Use Search button if country code is unknown.	
7	Enter **City**.	
8	Select **State** from drop down list.	
9	Enter Zip Code +4.	
10	Enter **Phone Number** plus extension.	

Step	Action	Response
11	Enter Fax number.	
12	Click **Save**.	Tortfeasor panel information is saved.

6.111.6.3 To Update on the Other - Tortfeasor Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Tortfeasor panel information is updated.

6.111.6.4 To Delete on the Other - Tortfeasor Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.112 Related Data - Xref Panel Overview

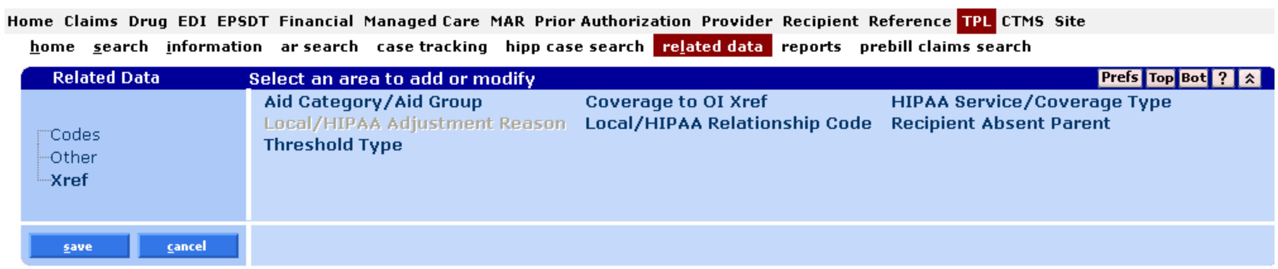
6.112.1 Related Data - Xref Panel Narrative

The point of access for the TPL Related Data Xref panels.

This panel is inquiry only.

Navigation Path: [TPL] – [Related Data] - [Xref]

6.112.2 Related Data - Xref Panel Layout



6.112.3 Related Data - Xref Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Aid Category/Aid Group	Link to the Aid Category/Aid Group panel.	Hyperlink	N/A	0
Cancel	Allows the user to cancel any changes in Xref.	Button	N/A	0
Coverage to OI Xref	Link to the Coverage to OI Xref panel.	Hyperlink	N/A	0
HIPAA Service/Coverage Type	Link to the HIPAA Service/Coverage Type panel.	Hyperlink	N/A	0
Local/HIPAA Adjustment Reason	Link to the Local/HIPAA Adjustment Reason panel.	Hyperlink	N/A	0
Local/HIPAA Relationship Code	Link to the Local/HIPAA Relationship Code panel.	Hyperlink	N/A	0
Recipient Absent Parent	Link to the to Recipient Absent Parent panel.	Hyperlink	N/A	0
Save	Allows the user to save a record in Xref.	Button	N/A	0
Threshold Type	Link to the Threshold Type panel.	Hyperlink	N/A	0

6.112.4 Related Data - Xref Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.112.5 Related Data - Xref Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.112.6 Related Data - Xref Panel Accessibility

6.112.6.1 To Access the Related Data – Xref Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Xref** hyperlink located on the Related Data panel.	Related Data-Xref panel displays.

6.113 Xref - Aid Category/Aid Group Panel Overview

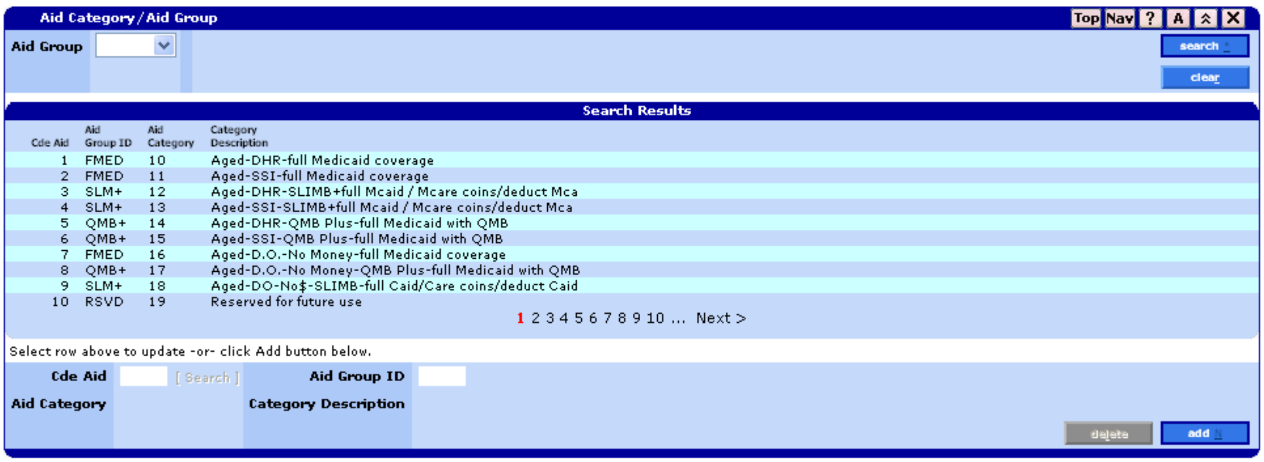
6.113.1 Xref - Aid Category/Aid Group Panel Narrative

The Xref-Aid Category/Aid Group panel is used to add or delete an Aid group, which is used to determine HIPP cost-effectiveness.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [Related Data] - [Xref] - [Aid Category/Aid Group]

6.113.2 Xref - Aid Category/Aid Group Panel



6.113.3 Xref - Aid Category/Aid Group Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Xref – Aid Category/Aid Group panel.	Button	N/A	0
Aid Category	This entity identifies the type of aid for which a recipient is eligible.	Field	Number (Integer)	9
Aid Group ID	This groups aid categories into specific groups with similar characteristics.	Field	Character	4
Category Description	Describes the type of aid for which a recipient is eligible.	Field	Character	50
Cde Aid [Search]	This is the system-assigned internal key that is 4 bytes long.	Hyperlink	N/A	0
Clear	The button clears the aid group selected.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0

Field	Description	Field Type	Data Type	Length
Search	This button allows the user to search by aid group.	Button	N/A	0

6.113.4 Xref - Aid Category/Aid Group Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Aid Group ID	Field	1	Aid Group ID is required.	Enter a valid Aid Group ID.
Cde Aid [Search]	Hyperlink	1	A valid Cde Aid is required.	Enter a valid Aid Code

6.113.5 Xref - Aid Category/Aid Group Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.113.6 Xref - Aid Category/Aid Group Panel Accessibility

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Xref** hyperlink located on the Related Data panel.	Related Data-Xref panel displays.
4	Click Aid Category/Aid Group.	Aid Category/Aid Group panel displays.

6.113.6.1 To Navigate on the Xref - Aid Category/Aid Group Panel

Step	Action	Response
1	Select **Aid Group** from the drop down list box.	
2	Click **Search**.	Aid Category/Aid Group information displays.

6.113.6.2 To Add on the Xref - Aid Category/Aid Group Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Click **[Search]** located to right of the Cde Aid field.	Cde Aid Search panel displays.
3	Enter search criteria into fields. User may also select row from search results to display Cde Aid information.	

Step	Action	Response
4	Click **Search**.	Cde Aid, Aid Category and Category Description fields populate.
5	Enter Aid Group ID.	
6	Click **Save**.	Aid Category/Aid Group information is saved.

6.113.6.3 To Update on the Xref - Aid Category/Aid Group Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Aid Category/Aid Group information is saved.

6.113.6.4 To Delete on the Xref - Aid Category/Aid Group Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.114Xref - Coverage to OI Panel Overview

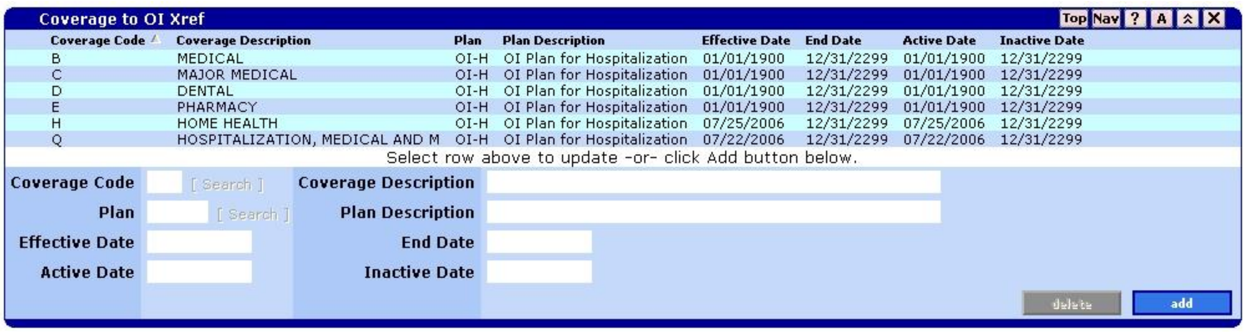
6.114.1 Xref - Coverage to OI Panel Narrative

The Xref-Coverage to OI panel is used to define relationships between Other Insurance (OI) plans and TPL coverage codes to support the TPL matrix.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [Related Data] - [Xref] - [Coverage to OI Xref]

6.114.2 Xref - Coverage to OI Panel Layout



6.114.3 Xref - Coverage to OI Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Active Date	The date that the row becomes active.	Field	Date (MM/DD/CCYY)	8
Add	Adds a new Coverage to OI Xref entry. The user is not allowed to add the same coverage and same OI plan if the same combination already exists. The user is allowed to add a new record using an existing coverage and/or plan as long as the combination doesn't already exist and the dates do not overlap.	Button	N/A	0
Coverage Code [Search]	TPL code that identifies the type of coverage linked to this OI Plan (read only).	Hyperlink	N/A	0
Coverage Description	Type of coverage description that is linked to the coverage code (read only).	Field	Character	120
Delete	Deletes the currently selected Coverage to OI Xref entry.	Button	N/A	0
Effective Date	Effective date of the row.	Field	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
End Date	End date of the row.	Field	Date (MM/DD/CCYY)	8
Inactive Date	The date that the row becomes inactive.	Field	Date (MM/DD/CCYY)	8
Plan [Search]	OI plan code linked to the coverage code.	Hyperlink	N/A	0
Plan Description	OI Plan Description linked to the OI plan code.	Listview	Character	50

6.114.4 Xref - Coverage to OI Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Active Date	Field	1	Active Date must be greater than or equal to 01/01/1900.	Enter a different active date.
Coverage Code [Search]	Hyperlink	7008	A valid Coverage Code is required.	Enter or search for a valid Coverage Code.
	Hyperlink	7010	Coverage code and plan code combination already exists.	Use a different coverage or plan or update the existing combination.
Effective Date	Field	2	Effective Date must be greater than or equal to 01/01/1900.	Enter a different Effective Date.
End Date	Field	1	End Date must be greater than or equal to 01/01/1900.	Enter a different End Date.
Inactive Date	Field	1	Inactive Date must be greater than or equal to 01/01/1900.	Enter a different Inactive Date
Plan [Search]	Hyperlink	1	A valid Plan is required.	Enter or search for a valid Plan code.
	Hyperlink	2	Coverage code and plan code combination already exists.	Use a different coverage or Plan or update the existing combination.

6.114.5 Xref - Coverage to OI Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.114.6 Xref - Coverage to OI Panel Accessibility

6.114.6.1 To Access the Xref - Coverage to OI Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Xref** hyperlink located on the Related Data panel.	Related Data-Xref panel displays.
4	Select Coverage to OI Xref.	Xref-Coverage to OI panel displays.

6.114.6.2 To Add on the Xref - Coverage to OI Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Coverage Code. Click [Search] if Coverage Code is unknown. User can locate value by entering Coverage Code, Coverage Description or selecting a row from the search results.	Coverage Description field is populated.
3	Enter **Plan**. Click [Search] if Plan is unknown. User can locate value by entering Recipient Plan, Description or selecting a row from the search results.	Plan Description field is populated.
4	Update **Effective Date**, if needed. Note: Field automatically pre-fills with today's date.	
5	Update **Active Date**, if needed. Note: Field automatically pre-fills with today's date.	
6	Update **End Date**, if needed. Note: Field automatically pre-fills with today's date.	
7	Update **Inactive Date**, if needed. Note: Field automatically pre-fills with today's date.	
8	Click **Save**.	Xref-Coverage to OI information is saved.

6.114.6.3 To Update on the Xref - Coverage to OI Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Xref-Coverage to OI information is saved.

6.114.6.4 To Delete on the Xref - Coverage to OI Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

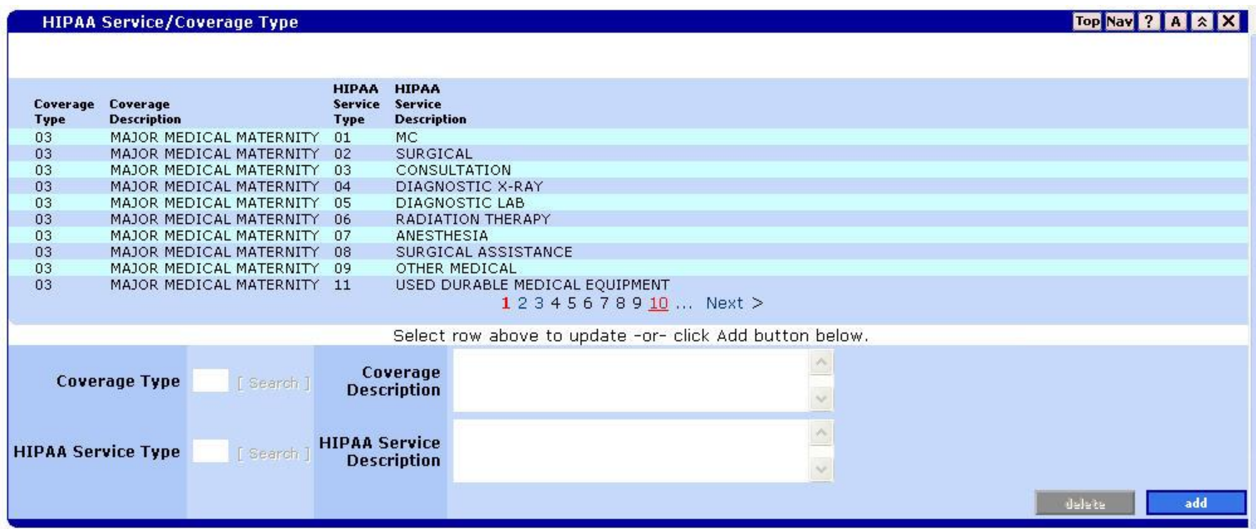
6.115Xref - HIPAA Service/Coverage Type Panel Overview

6.115.1 Xref - HIPAA Service/Coverage Type Panel Narrative

The Xref-HIPAA Service/Coverage Type panel contains the HIPAA service type code mapped to TPL coverage code. Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Xref] - [HIPAA Service/Coverage Type]

6.115.2 Xref - HIPAA Service/Coverage Type Panel Layout



6.115.3 Xref - HIPAA Service Coverage Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Xref – HIPAA Service Coverage Type panel.	Button	N/A	0
Coverage Description	This describes the type of coverage (services) a TPL resource provides.	Field	Character	120
Coverage Type [Search]	This code identifies the type of coverage that a TPL policy provides.	Hyperlink	N/A	0
Delete	Deletes the current record.	Button	N/A	0
HIPAA Service Description	This field contains the description for the HIPAA service type code.	Field	Character	120
HIPAA Service Type [Search]	This field contains the HIPAA service type code which describes the type of coverage a recipient has with a policy.	Hyperlink	N/A	0

6.115.4 Xref - HIPAA Service/Coverage Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Coverage Type [Search]	Hyperlink	1	A valid Coverage Type is required.	Enter a valid Coverage Type.
	Hyperlink	2	Invalid Coverage Type.	Enter a valid Coverage Type or use the [Search] link to find a valid Coverage Type code.
	Hyperlink	3	A duplicate record cannot be saved.	Enter a another valid Coverage Type or use the [Search] link to find a another valid Coverage Type code.
HIPAA Service Type [Search]	Hyperlink	1	A valid HIPPA Service Type is required.	Enter a valid HIPAA Service Type or click Search and select one from the list.
	Hyperlink	2	Invalid HIPAA Service Type.	Enter a valid HIPAA Service Type or click [Search] to find a valid HIPAA Service Type code.
	Hyperlink	3	A duplicate record cannot be saved.	Enter a another valid HIPAA Service Type or click [Search] to find a another valid HIPAA Service Type code.

6.115.5 Xref - HIPAA Service/Coverage Type Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.115.6 Xref-HIPAA Service/Coverage Type Panel Accessibility

6.115.6.1 To Access the Xref-HIPAA Service/Coverage Type Panel

Step	Action	Response
1	Enter **User Name** and **Password**; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Xref** hyperlink located on the Related Data panel.	Related Data-Xref panel displays.
4	Select HIPAA Service/Coverage Type.	HIPAA Service/Coverage Type panel displays.

6.115.6.2 To Add on the Xref-HIPAA Service/Coverage Type Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Coverage Type. Click [Search] if Coverage Code is unknown. User can locate value by entering Coverage Code, Coverage Description or selecting a row from the search results.	Coverage Description field is populated.
3	Enter HIPAA Service Type. Click [Search] if HIPAA Service Type is unknown. User can locate value by entering HIPPA Service Type, Description or selecting a row from the search results.	HIPPA Service Description field is populated.
4	Click **Save**.	HIPAA Service/Coverage Type information is saved.

6.115.6.3 To Update on the Xref-HIPAA Service/Coverage Type Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	HIPAA Service/Coverage Type information is saved.

6.115.6.4 To Delete on the Xref-HIPAA Service/Coverage Type Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.116Xref - Local/HIPAA Adjustment Reason Panel Overview

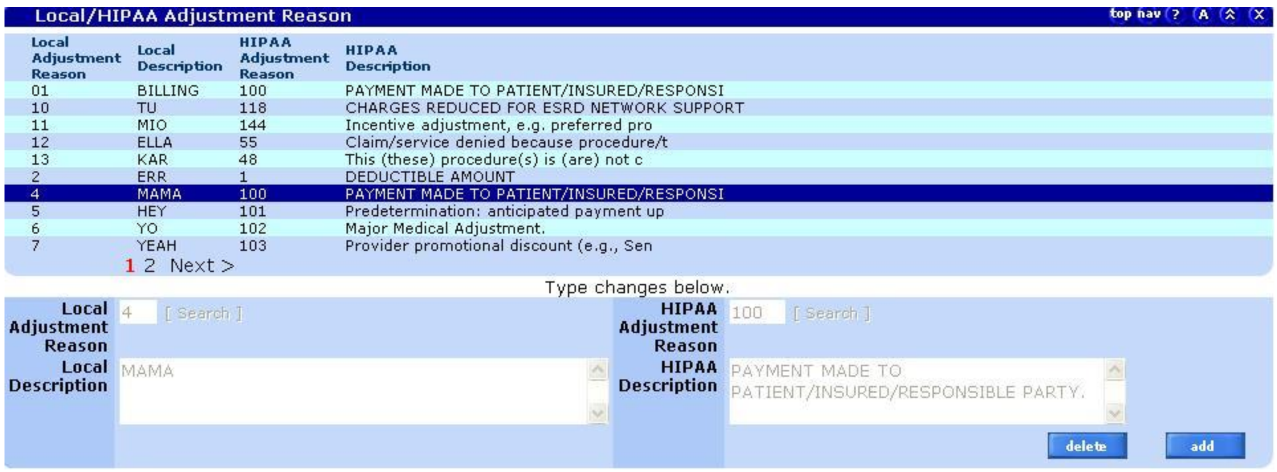
6.116.1 Xref -Local/HIPAA Adjustment Reason Panel Narrative

The Xref-Local/HIPAA Adjustment Reason panel contains data used for cross-referencing the adjustment reasons in the legacy system to the HIPAA standard adjustment reasons. This cross-reference is needed for any external data extracts.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Xref] - [Local/HIPAA Adjustment Reason]

6.116.2 Xref - Local/HIPAA Adjustment Reason Panel Layout



6.116.3 Xref - Local/HIPAA Adjustment Reason Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Xref – Local/HIPAA Adjustment Reason panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
HIPAA Adjustment Reason [Search]	This identifies the HIPAA Adjustment Reason Codes that may be received on a 835 transaction and posted to the TPL accounts receivables.	Hyperlink	N/A	0
HIPAA Description	This field contains the description associated with a specific HIPAA Adjustment Reason Code.	Field	Character	50
Local Adjustment Reason [Search]	The Alabama specific reason code that may be used to post to the TPL accounts receivables.	Hyperlink	N/A	0
Local Description	A description of the local A/R reason code.	Field	Character	50

6.116.4 Xref - Local/HIPAA Adjustment Reason Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
HIPAA Adjustment Reason [Search]	Hyperlink	1	A valid HIPAA Adjustment Reason is required.	Enter a valid HIPAA Adjustment reason or select one from the list.
Local Adjustment Reason [Search]	Hyperlink	1	A valid Local Adjustment Reason is required.	Enter a TPL A/R Adjustment Reason.

6.116.5 Xref - Local HIPAA Adjustment Reason Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.116.6 Xref - Local Local/HIPAA Adjustment Reason Panel Accessibility

6.116.6.1 To Access the Xref - Local/HIPAA Adjustment Reason Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Xref** hyperlink located on the Related Data panel.	Related Data-Xref panel displays.
4	Select Local/HIPAA Adjustment Reason.	Local /HIPAA Adjustment Reason panel displays.

6.116.6.2 To Add Xref - Local/HIPAA Adjustment Reason on the Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Local Adjustment Reason. Click [Search] if Local Adjustment Reason is unknown. User can locate value by entering Reason Code, Description or selecting a row from the search results.	Local Description field is populated.
3	Enter HIPAA Adjustment Reason. Click [Search] if Local Adjustment Reason is unknown. User can locate value by entering HIPPA Adjustment Reason, Description, selecting Group from the drop down list box or selecting a row from the search results.	HIPPA Description field is populated.
4	Click **Save**.	Local HIPAA Adjustment Reason information is saved.

6.116.6.3 To Update on the Xref - Local/HIPAA Adjustment Reason Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Local/HIPAA Adjustment Reason information is saved.

6.116.6.4 To Delete on the Xref - Local/HIPAA Adjustment Reason Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.117 Xref - Local HIPAA Relationship Code Panel Overview

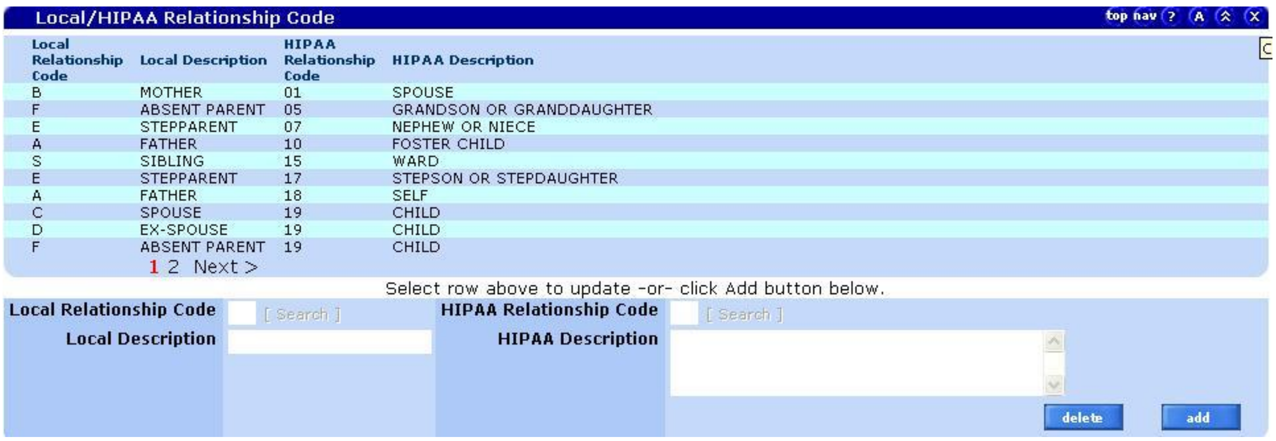
6.117.1 Xref - Local/HIPAA Relationship Code Panel Narrative

The Xref-Local/HIPAA Relationship Code panel contains the TPL relationship codes and their corresponding HIPAA relationship codes.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Related Data] - [Xref] - [Local/HIPAA Relationship Code]

6.117.2 Xref - Local/HIPAA Relationship Code Panel Layout



6.117.3 Xref - Local/HIPAA Relationship Code Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Xref – Local/HIPAA Relationship Code panel.	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
HIPAA Description	This field contains the description associated with a specific HIPAA relationship code.	Field	Character	120
HIPAA Relationship Code [Search]	This code identifies the relationship of the recipient to the policyholder.	Hyperlink	N/A	0
Local Description	This field contains the description associated with a specific relationship code.	Field	Character	21
Local Relationship Code [Search]	This code identifies the relationship of the policyholder to the recipient covered by a TPL policy.	Hyperlink	N/A	0

6.117.4 Xref - Local/HIPAA Relationship Code Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
HIPAA Relationship Code [Search]	Hyperlink	1	A valid HIPAA Relationship Code is required.	Enter a valid HIPAA Relationship Code or select one from the list.
	Field	2	A duplicate record cannot be saved.	Verify keying. A duplicate record cannot be saved.
Local Relationship Code [Search]	Hyperlink	1	A valid Local Relationship Code is required	Enter a valid Local Relationship Code.

6.117.5 Xref - Local/HIPAA Relationship Code Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.117.6 Xref - Local/HIPAA Relationship Code Panel Accessibility

6.117.6.1 To Access the Xref - Local/HIPAA Relationship Code Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Xref** hyperlink located on the Related Data panel.	Related Data-Xref panel displays.
4	Select Local/HIPAA Relationship Code.	Local/HIPAA Relationship Code panel displays.

6.117.6.2 To Add on the Xref - Local/HIPAA Relationship Code Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Local Relationship Code. Click [Search] if Local Relationship code is unknown.	Local Description field is populated.
3	Enter HIPAA Relationship Code. Click [Search] if HIPAA Relationship Code is unknown.	HIPAA Description field is populated.
4	Click **Save**.	Local/HIPAA Relationship Code information is saved.

6.117.6.3 To Update on the Xref - Local/HIPAA Relationship Code Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Local/HIPAA Relationship Code information is saved.

6.117.6.4 To Delete on the Xref - Local/HIPAA Relationship Code Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.118Xref - Recipient Absent Parent Panel Overview

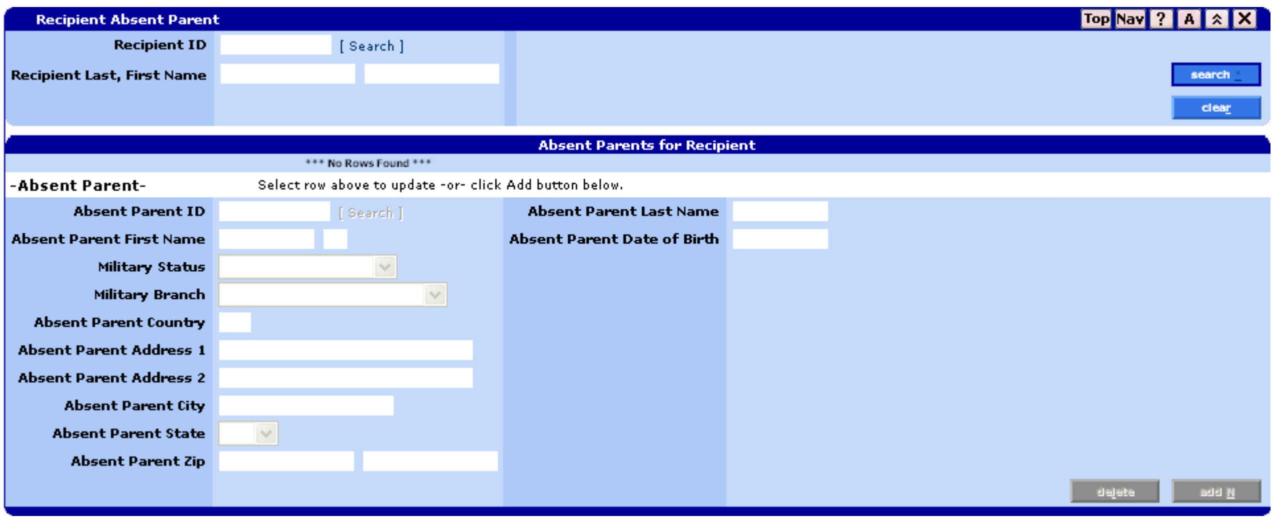
6.118.1 Xref - Recipient Absent Parent Panel Narrative

The Xref-Recipient Absent Parent panel displays a recipient's TPL absent parent data in response to an inquiry or else allows for the adding or updating of data.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Search] - (Select row from search results) - [TPL Maintenance] – [Absent Parent] - OR -[TPL] – [Related Data] - [Xref] - [Recipient Absent Parent]

6.118.2 Xref - Recipient Absent Parent Panel Layout



6.118.3 Xref - Recipient Absent Parent Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Add	Allows a user to add a new record on the Xref – Recipient Absent Parent panel.	Button	N/A	0
Absent Parent Address 1	The first address line of the absent parent used for correspondence. Could be an international address if country code is not US.	Field	Character	55
Absent Parent Address 2	The second address line of the absent parent used for correspondence. Could be an international address if country code is not US.	Field	Character	55

Field	Description	Field Type	Data Type	Length
Absent Parent City	This is the absent parent's city where the correspondence is sent to. Could be an out of country city if country code is not US.	Field	Character	30
Absent Parent Country	Two character ISO country abbreviation.	Field	Character	2
Absent Parent Date of Birth	Absent parent's date of birth.	Field	Date (MM/DD/CCYY)	8
Absent Parent First Name, MI	This is the first name and middle initial of the member's absent or custodial parent.	Field	Character	13
Absent Parent ID	Absent parent identification number.	Field	Number (Integer)	9
Absent Parent Last Name	This is the last name of the member's absent or custodial parent.	Field	Character	15
Absent Parent State	This is the state abbreviation for the state in which the absent parent resides.	Combo Box	Drop Down List Box	0
Absent Parent Zip	This is the first five digits of the absent parent's zip code used for correspondence. Could also be an out of country zip code if country code is not US.	Field	Character	15
Absent Parent Zip + 4	This is the last four digits of the absent parent's zip code used for correspondence.	Field	Character	4
Clear	This button allows the user to clear recipient absent parent information	Button	N/A	0
Delete	Allows a user to remove a record from the data list.	Button	N/A	0
Military Branch	The absent parent’s branch of service code.	Combo Box	Drop Down List Box	0

Field	Description	Field Type	Data Type	Length
Military Status	This is the Military status of the absent parent. Recommended values are: A =Active D = 100% DAV E = MEPCOM Enlistee N = National Guard R = Retired V = Reserve X = Other Z = Unknown Space = Not Military	Combo Box	Drop Down List Box	0
Recipient ID [Search]	Unique identifier for the recipient.	Hyperlink	Character	12
Recipient Last, First Name	The name of the recipient.	Field	Character	36
Search	This button allows the user to search by Recipient ID.	Button	N/A	0
[Search]	Allows the user to search by Absent Parent ID.	Hyperlink	N/A	0

6.118.4 Xref - Recipient Absent Parent Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Absent Parent First Name	Field	7092	First Name is required when first name is keyed.	Enter first name.
Absent Parent Last Name	Field	7093	Last name is required when last name is keyed.	Enter last name.

6.118.5 Xref - Recipient Absent Parent Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.118.6 Xref - Recipient Absent Parent Panel Accessibility

6.118.6.1 To Access the Xref – Recipient Absent Parent Panel

Step	Action	Response
1	Enter **User Name** and **Password**; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Xref** hyperlink located on the Related Data panel.	Related Data-Xref panel displays.
4	Click Recipient Absent Parent.	Recipient Absent Parent panel displays.

6.118.6.2 To Add on the Xref - Recipient Absent Parent Panel

Step	Action	Response
1	Click **Add**.	Activates fields for entry of data or selection from lists.
2	Enter Absent Parent ID.	
3	Enter Absent Parent First Name.	
4	Select **Military Status** from drop down list.	
5	Select **Military Branch** from drop down list.	
6	Enter Absent Parent County.	
7	Enter Absent Parent Address 1.	
8	Enter Absent Parent Address 2.	
9	Enter Absent Parent City.	
10	Select **Absent Parent State** from drop down list.	
11	Enter Absent Parent Zip Code +4.	
12	Enter Absent Parent Last Name.	
13	Enter Absent Parent Date of Birth.	
14	Click **Save**.	Recipient Absent Parent information is saved.

6.118.6.3 To Update on the Xref - Recipient Absent Parent Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Recipient Absent Parent information is saved.

6.118.6.4 To Delete on the Xref - Recipient Absent Parent Panel

Step	Action	Response
1	Click line item to be deleted.	Fields are populated with data related to the line selected.
2	Click **Delete**.	Line item is deleted.

6.119Xref - Threshold Type Panel Overview

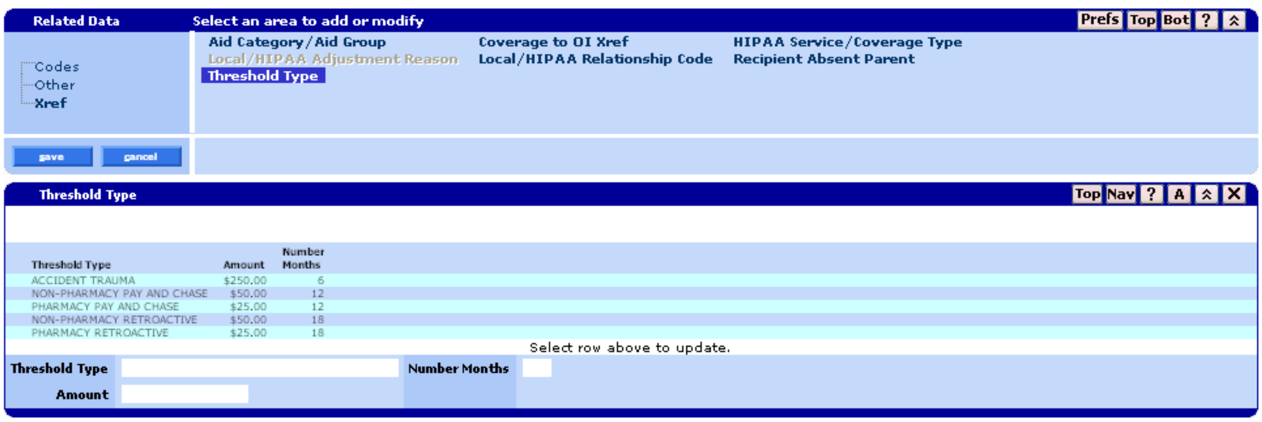
6.119.1 Xref - Threshold Type Panel Narrative

The Xref-Threshold Type panel is used to update threshold amounts and the number of months to accumulate claims. Only authorized users are allowed to perform maintenance tasks on this panel.

The Threshold Type panel should not have buttons for adds or deletes, only have the capability of updating existing threshold types. The reason for this is that the threshold types are hard-coded into the batch processes, but the dollar amounts and month durations are not hard-coded.

Navigation Path: [TPL] – [Related Data] - [XRef] - [Threshold Type]

6.119.2 Xref - Threshold Type Panel Layout



6.119.3 Xref - Threshold Type Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Amount	Dollar amount of threshold.	Field	Number (Decimal)	17
Cancel	Allows the user to cancel any changes.	Button	N/A	0
Number Months	Number of months claims are selected to accumulate to the threshold amount.	Field	Number (Integer)	2
Save	Allows the user to save a record.	Button	N/A	0
Threshold Type	Description of the type of threshold.	Field	Character	40

6.119.4 Xref - Threshold Type Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Amount	Field	2	Amount is required.	Enter an amount.
	Field	3	Amount must be less than or equal to 999999999.99.	Enter an amount less than or equal to 999999999.99.
Number Months	Field	1	Enter a valid value.	Number Months is numeric only.

6.119.5 Xref - Threshold Type Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.119.6 Xref - Threshold Type Panel Accessibility

6.119.6.1 To Access the Xref – Threshold Type Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Related Data**.	Related Data panel displays.
3	Click the **Xref** hyperlink located on the Related Data panel.	Related Data-Other panel displays.
4	Click Threshold Type.	Threshold Type panel displays.

6.119.6.2 To Update on the Xref – Threshold Type Panel

Step	Action	Response
1	Click to highlight the row to be updated.	Data is populated in fields.
2	Click in desired field to update and perform update.	
3	Click **Save**.	Threshold Type information is updated.

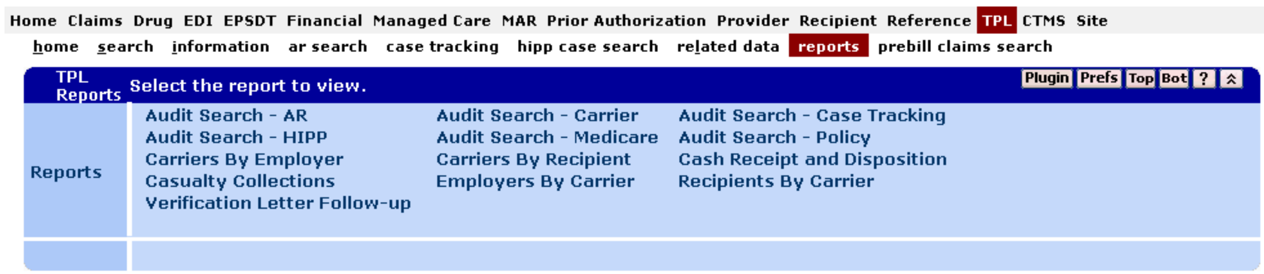
6.120 TPL Reports Page Overview

6.120.1 TPL Reports Page Narrative

The TPL Reports panel allows the user to select a report to print online. This panel is inquiry only.

Navigation Path: [TPL] – [Reports]

6.120.2 TPL Reports Page Layout



6.120.3 TPL Reports Page Field Descriptions

Field	Description	Field Type	Data Type	Length
Audit Search-AR	Link to Audit Search-AR panel.	Hyperlink	N/A	0
Audit Search-Carrier	Link to Audit Search-Carrier panel.	Hyperlink	N/A	0
Audit Search-Case Tracking	Link to Audit Search-Case Tracking panel.	Hyperlink	N/A	0
Audit Search-HIPP	Link to Audit Search-HIPP panel.	Hyperlink	N/A	0
Audit Search-Medicare	Link to Audit Search-Medicare panel.	Hyperlink	N/A	0
Audit Search-Policy	Link to Audit Search-Policy panel.	Hyperlink	N/A	0
Carriers by Recipient	Link to Carriers by Recipient panel.	Hyperlink	N/A	0
Carriers by Employer	Link to Carriers by Employer panel.	Hyperlink	N/A	0
Cash Receipt and Disposition	Link to Cash Receipt and Disposition panel.	Hyperlink	N/A	0
Casualty Collections	Link to Casualty Collections panel.	Hyperlink	N/A	0
Employers by Carrier	Link to Employers by Carrier panel.	Hyperlink	N/A	0
Recipients by Carrier	Link to Recipients by Carrier panel.	Hyperlink	N/A	0
Verification Letter Follow-Up	Link to Verification Letter Follow-Up panel.	Hyperlink	N/A	0

6.120.4 TPL Reports Page Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for thispanel.				

6.120.5 TPL Reports Page Extra Features

Field	Field Type
No extra features found for this panel.	

6.120.6 TPL Reports Page Accessibility

6.120.6.1 To Access the TPL Reports Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports.**	TPL Reports panel displays.

6.121 Reports – Audit Search - AR Panel Overview

6.121.1 Reports – Audit Search - AR Panel Narrative

The Reports-Audit Search –AR panel allows the user to search the System Audit Trail for Accounts Receivable Updates by User ID and date range. It returns records that have been added, changed or deleted for that user for the given date. Report will filter by Carrier Number, Action Code, Date range and AR Reason as selected by requester.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Audit Search-AR]

6.121.2 Reports – Audit Search - AR Panel Layout

6.121.3 Reports – Audit Search - AR Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Action Code	The modification action of the user. Values (Insert, Update, and Delete).	Combo Box	Drop Down List Box	0
AR Reason	This field is entered as part of the search criteria. It is only valid for searches of the audit trail for 'Accounts Receivable'. updates.	Field	Character	4
Carrier Number	Identifies TPL Carrier identification number assigned to the TPL other insurance carrier. It uniquely identifies the carrier internally to the system.	Field	Character	7
Clear	Clears out the case number field.	Button	N/A	0
From Date	The earliest date to be included in the search.	Field	Date (MM/DD/CCYY)	8
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Searches by the entered case number.	Button	N/A	0
To Date	The latest date to be included in the search. When the user wishes to limit the search to a specific date this field will be entered with the same value as the 'From Search Date'.	Field	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
User ID	Identification number of the user.	Field	Character	8

6.121.4 Reports – Audit Search - AR Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
From Date	Field	1	Both dates has to be entered to filter search result by dates.	Both a From date and To date must be entered.
To Date	Field	2	Both dates has to be entered to filter search result by dates.	Both a From date and To date must be entered.
User ID	Field	3	User ID must be entered.	Enter a valid User ID

6.121.5 Reports – Audit Search - AR Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.121.6 Reports – Audit Search - AR Panel Accessibility

6.121.6.1 To Access the Reports - Audit Search – AR Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Audit Search-AR.	Audit Search-AR panel displays.

6.121.6.2 To Navigate on the Reports – Audit Search - AR Panel

Step	Action	Response
1	Enter **User ID**.	
2	Select **Action Code** from the drop down list box.	
3	Enter Carrier Number.	
4	Enter **From Date** in MM/DD/CCYY format.	
5	Enter **To Date** in MM/DD/CCYY format.	
6	Enter AR Reason.	
7	Select number of records to retrieve from the drop down list box.	
8	Click **View**.	Audit Search-AR report is displayed.

6.122 Reports – Audit Search - Carrier Panel Overview

6.122.1 Reports – Audit Search - Carrier Panel Narrative

The Reports –Audit Search-Carrier panel allows the user to search the System Audit Trail for Carrier Updates by User ID and date range. It returns records that have been added, changed or deleted for that user for the given date. The report can be filtered by Carrier Number if necessary.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Audit Search-Carrier]

6.122.2 Reports – Audit Search - Carrier Panel Layout

6.122.3 Reports – Audit Search - Carrier Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Action Code	The modification action of the user. Values (Insert, Update, and Delete).	Combo Box	Drop Down List Box	0
Carrier Number	Identifies TPL Carrier identification assigned to the TPL other insurance carrier. It uniquely identifies the carrier internally to the system.	Field	Character	7
Clear	Clears out the case number field.	Button	N/A	0
From Date	The earliest date to be included in the search.	Field	Date (MM/DD/CCYY)	8
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Searches by the entered case number.	Button	N/A	0
To Date	The latest date to be included in the search. When the user wishes to limit the search to a specific date this field will be entered with the same value as the 'From Search Date'.	Field	Date (MM/DD/CCYY)	8
User ID	Identification number of the user.	Field	Character	8

6.122.4 Reports – Audit Search - Carrier Panel Layout Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
User ID	Field	1	User ID must be entered.	Enter a valid User ID.

6.122.5 Reports – Audit Search - Carrier Panel Layout Extra Features

Field	Field Type
No extra features found for this panel.	

6.122.6 Reports – Audit Search - Carrier Panel Layout Accessibility

6.122.6.1 To Access the Reports – Audit Search – Carrier Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Audit Search-Carrier.	Audit Search-Carrier panel displays.

6.122.6.2 To Navigate on the Reports – Audit Search - Case Tracking Panel

Step	Action	Response
1	Enter **User ID**.	
2	Select **Action Code** from the drop down list box.	
3	Enter Carrier Number.	
4	Enter **From Date** in MM/DD/CCYY format.	
5	Enter **To Date** in MM/DD/CCYY format.	
6	Select number of records to retrieve from the drop down list box.	
7	Click **View**.	Audit Search-Carrier report is displayed.

6.123 Reports – Audit Search – Case Tracking Panel Overview

6.123.1 Reports – Audit Search – Case Tracking Panel Narrative

The Reports – Audit Search-Case Tracking panel allows the user to search the System Audit Trail for Case Tracking Updates by User ID and date range. It returns records that have been added, changed or deleted for that user for the given date.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Audit Search-Case Tracking]

6.123.2 Reports – Audit Search - Case Tracking Panel Layout

6.123.3 Reports – Audit Search - Case Tracking Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Action Code	The modification action of the user. Values (Insert, Update, and Delete).	Combo Box	Drop Down List Box	0
Carrier Number	Identifies TPL Carrier identification assigned to the TPL other insurance carrier. It uniquely identifies the carrier internally to the system.	Field	Character	7
Clear	Clears out the case number field.	Button	N/A	0
From Date	The earliest date to be included in the search.	Field	Date (MM/DD/CCYY)	8
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Searches by the entered case number.	Button	N/A	0
To Date	The latest date to be included in the search. When the user wishes to limit the search to a specific date this field will be entered with the same value as the 'From Search Date'.	Field	Date (MM/DD/CCYY)	8
User ID	The identification number of the user.	Field	Character	8

6.123.4 Reports – Audit Search - Case Tracking Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
From Date	Field	1	From Date must be before To Date.	Enter a valid From Date.
User ID	Field	1	User ID must be entered.	Enter a valid User ID.

6.123.5 Reports – Audit Search - Case Tracking Extra Features

Field	Field Type
No extra features found for this panel.	

6.123.6 Reports – Audit Search - Case Tracking Panel Accessibility

6.123.6.1 To Access the Reports – Audit Search - Case Tracking Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Audit Search-Case Tracking.	Audit Search-Case Tracking panel displays.

6.123.6.2 To Navigate on the Reports – Audit Search - Case Tracking Panel

Step	Action	Response
1	Enter **User ID**.	
2	Select **Action Code** from the drop down list box.	
3	Enter Carrier Number.	
4	Enter **From Date** in MM/DD/CCYY format.	
5	Enter **To Date** in MM/DD/CCYY format.	
6	Select number of records to retrieve from the drop down list box.	
7	Click **View**.	Audit Search-Case Tracking report is displayed.

6.123.6.3 To Navigate on the Reports – Audit Search-Case Tracking Panel

Step	Action	Response
1	Enter **User ID**.	
2	Select **Action Code** from the drop down list box.	
3	Enter Carrier Number.	
4	Enter **From Date** in MM/DD/CCYY format.	

Step	Action	Response
5	Enter **To Date** in MM/DD/CCYY format.	
6	Select number of records to retrieve from the drop down list box.	
7	Click **View**.	Audit Search-Case Tracking report is displayed.

6.124Reports – Audit Search – HIPP Panel Overview

6.124.1 Reports – Audit Search - HIPP Panel Narrative

The Reports – Audit Search-HIPP panel allows the user to search the System Audit Trail for HIPP Updates by User ID and date range. It returns records that have been added, changed or deleted for that user for the given date.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Audit Search-HIPP]

6.124.2 Reports – Audit Search - HIPP Panel Layout

6.124.3 Reports – Audit Search – HIPP Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Action Code	The modification action of the user. Values (Insert, Update, and Delete).	Combo Box	Drop Down List Box	0
Carrier Number	Identifies TPL Carrier identification assigned to the TPL other insurance carrier. It uniquely identifies the carrier internally to the system.	Field	Character	7
Clear	Clears out the case number field.	Button	N/A	0
Employer Code	Identifies the TPL Employer identification number. It uniquely identifies the employer internally to the system.	Field	Character	7
From Date	The earliest date to be included in the search.	Field	Date (MM/DD/CCYY)	8
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Searches by the entered case number.	Button	N/A	0
To Date	The latest date to be included in the search. When the user wishes to limit the search to a specific date this field will be entered with the same value as the 'From Search Date'.	Field	Date (MM/DD/CCYY)	8
User ID	Identification number of the user.	Field	Character	8

6.124.4 Reports – Audit Search-HIPP Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
User ID	Field	1	User ID must be entered.	Enter a valid User ID.

6.124.5 Reports – Audit Search-HIPP Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.124.6 Reports – Audit Search-HIPP Panel Accessibility

6.124.6.1 To Access the Reports - Audit Search - HIPP Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Audit Search-HIPP.	Audit Search-HIPP panel displays.

6.124.6.2 To Navigate on the Reports – Audit Search-HIPP Panel

Step	Action	Response
1	Enter **User ID**.	
2	Select **Action Code** from the drop down list box.	
3	Enter Carrier Number.	
4	Enter **From Date** in MM/DD/CCYY format.	
5	Enter **To Date** in MM/DD/CCYY format.	
6	Enter Employer Code.	
7	Select number of records to retrieve from the drop down list box.	
8	Click **View**.	Audit Search-HIPP report is displayed.

6.125 Reports – Audit Search – Medicare Panel Overview

6.125.1 Reports – Audit Search - Medicare Panel Narrative

The Reports – Audit Search-Medicare panel allows the user to search the System Audit Trail for Medicare Updates by User ID and date range. It returns records that have been added, changed or deleted for that user for the given date.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Audit Search-Medicare]

6.125.2 Reports – Audit Search - Medicare Panel Layout

6.125.3 Reports – Audit Search - Medicare Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Action Code	The modification action of the user. Values (Insert, Update, and Delete).	Combo Box	Drop Down List Box	0
Add/Chg Type	This field is entered as part of the search criteria. It only applies to Medicare Audit searches. The valid values are Manual and System.	Combo Box	Drop Down List Box	0
Clear	Clears out the case number field.	Button	N/A	0
From Date	The earliest date to be included in the search.	Field	Date (MM/DD/CCYY)	8
Medicare Type	This field is entered as part of the search criteria. Valid values are BOTH A & B (include both Medicare Part A and Part B in the search results), PART A (include only Part A in the search results), PART B (include only Part B in the search results), PART D (include only Part D in the search results) and ALL (include Part A, B, and D in the search results).	Combo Box	Drop Down List Box	0
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Searches by the entered case number.	Button	N/A	0
To Date	The latest date to be included in the search. When the user wishes to limit the search to a specific	Field	Date (MM/DD/CCYY)	8

Field	Description	Field Type	Data Type	Length
	date this field will be entered with the same value as the 'From Search Date'.			
User ID	Identification number of the user.	Field	Character	8

6.125.4 Reports – Audit Search - Medicare Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.125.5 Reports – Audit Search - Medicare Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.125.6 Reports – Audit Search - Medicare Panel Accessibility

6.125.6.1 To Access the Reports - Audit Search-Medicare Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Audit Search-Medicare.	Audit Search-Medicare panel displays.

6.125.6.2 To Navigate on the Reports – Audit Search-Medicare Panel

Step	Action	Response
1	Enter **User ID**.	
2	Select **Action Code** from the drop down list box.	
3	Enter Carrier Number.	
4	Enter **From Date** in MM/DD/CCYY format.	
5	Enter **To Date** in MM/DD/CCYY format.	
6	Select **Medicare Type** from the drop down list box.	
7	Select number of records to retrieve from the drop down list box.	
8	Click **View**.	Audit Search-Medicare report is displayed.

6.126 Reports – Audit Search – Policy Panel Overview

6.126.1 Reports – Audit Search - Policy Panel Narrative

The Audit Search-Policy panel allows the user to search the System Audit Trail for Policy Updates by User ID and date range. It returns records that have been added, changed or deleted for that user for the given date. This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Audit Search-Policy]

6.126.2 Reports – Audit Search - Policy Panel Layout

6.126.3 Reports – Audit Search - Policy Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Action Code	The modification action of the user. Values (Insert, Update, and Delete).	Combo Box	Drop Down List Box	0
Carrier Number	Identifies TPL Carrier identification number assigned to the TPL other insurance carrier. It uniquely identifies the carrier internally to the system.	Field	Character	7
Clear	Clears out the case number field.	Button	N/A	0
Employer Code	Identifies the TPL Employer identification number. It uniquely identifies the employer internally to the system.	Field	Character	7
From Date	The earliest date to be included in the search.	Field	Date (MM/DD/CCYY)	8
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Search	Searches by the entered case number.	Button	N/A	0
To Date	The latest date to be included in the search. When the user wishes to limit the search to a specific date this field will be entered with the same value as the 'From Search Date'.	Field	Date (MM/DD/CCYY)	8
User ID	The identification number of the user.	Field	Character	8

6.126.4 Reports – Audit Search - Policy Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
From Date	Field	1	Both From and To dates need to be entered in order to filter by date.	Enter valid From and To Date (MM/DD/CCYY).
To Date	Field	1	Both From and To dates need to be entered in order to filter by date.	Enter valid From and To Date (MM/DD/CCYY).

6.126.5 Reports – Audit Search - Policy Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.126.6 Reports – Audit Search- Policy Panel - Accessibility

6.126.6.1 To Access the Reports - Audit Search - Policy Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Audit Search-Policy.	Audit Search-Policy panel displays.

6.126.6.2 To Navigate on the Reports –Audit Search - Policy Panel

Step	Action	Response
1	Enter **User ID**.	
2	Select **Action Code** from the drop down list box.	
3	Enter Carrier Number.	
4	Enter **From Date** in MM/DD/CCYY format.	
5	Enter **To Date** in MM/DD/CCYY format.	
6	Enter Employer Code.	
7	Select number of records to retrieve from the drop down list box.	
8	Click **View**.	Audit Search-Policy report is displayed.

6.127 Reports - Carriers By Recipient Panel Overview

6.127.1 Reports - Carriers By Recipient Panel Narrative

The Carriers by Recipient panel allows the user to enter criteria to display the Carrier by Recipient - online report.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Carriers By Recipient]

6.127.2 Reports - Carriers By Recipient Panel Layout

6.127.3 Reports - Carriers By Recipient Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Recipient ID	Recipient's current Medicaid identification number.	Field	Character	12
Report Format	Allows the user to select the format in which to display the report.	Combo Box	Drop Down List Box	0
[Search]	Search link allows for a more detailed search for a recipient using the identification number.	Hyperlink	N/A	0
View	Button that displays the report requested.	Button	N/A	0

6.127.4 Reports - Carriers By Recipient Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Recipient ID	Field	1	Recipieint ID is required.	Enter a valid Recipient ID.
	Field	2	The Recipient does not exist, please use the [Search] button.	Enter a valid Recipient ID.

6.127.5 Reports - Carriers By Recipient Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.127.6 Reports - Carriers By Recipient Panel Accessibility

6.127.6.1 To Access the Reports - Carriers By Recipient Panel

Step	Action	Response

1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Carriers By Recipient.	Carriers By Recipient panel displays.

6.127.6.2 To Navigate on the Reports - Carriers By Recipient Panel

Step	Action	Response
1	Enter Recipient ID. Note: Recipient ID is required. Users may utilize the [Search] field to locate ID.	
2	Select **Report Format** from drown down list. Valid values include: HTML, PDF and Excel. Note: Default format is HTML.	
3	Click **View**.	Carriers By Recipient report is displayed.

6.128 Reports - Carriers By Employer Panel Overview

6.128.1 Reports - Carriers By Employer Panel Narrative

The Carriers By Employer panel allows the user to enter criteria to display the Carriers by Employer - online report.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Carriers By Employer]

6.128.2 Reports - Carriers By Employer Panel Layout

6.128.3 Reports - Carriers By Employer Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Employer ID	This is a unique, user-defined employer identification number used on all screens and reports to identify the employer.	Field	Character	7
Report Format	Allows the user to select the format in which to display the report.	Combo Box	Drop Down List Box	0
[Search]	Search link allows for a more detailed search for an Employer ID using the identification number.	Hyperlink	N/A	0
View	Button that displays the report requested.	Button	N/A	0

6.128.4 Reports - Carriers By Employer Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Employer ID	Field	3	The Employer does not exist, please use the [Search] button.	Enter Valid Employer ID or click [Search] and Select Employer ID from list.

6.128.5 Reports - Carriers By Employer Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.128.6 Reports - Carriers By Employer Panel Accessibility

6.128.6.1 To Access the Reports - Carriers By Employer Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Carriers By Employer.	Carriers By Employer panel displays.

6.128.6.2 To Navigate on the Reports - Carriers By Employer Panel

Step	Action	Response
1	Enter Employer ID. Note: Employer ID is required. Users may utilize the [Search] field to locate ID.	
2	Select **Report Format** from drown down list. Valid values include: HTML, PDF and Excel. Note: Default format is HTML.	
3	Click **View**.	Carriers by Employer report displays.

6.129 Reports - Cash Receipt and Disposition Panel Overview

6.129.1 Reports - Cash Receipt and Disposition Panel Narrative

The Cash Receipt and Disposition panel allows the user to request the trial and final reports needed for balancing the cycle deposits against the AR dispositions and expenditures.

Only authorized users are allowed to perform maintenance tasks on this panel.

Navigation Path: [TPL] – [Reports] - [Cash Receipt and Disposition]

6.129.2 Reports - Cash Receipt and Disposition Panel Layout

6.129.3 Reports - Cash Receipt and Disposition Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Deposit From Date	The start of the deposit cycle for which the user needs to verify.	Field	Date (MM/DD/CCYY)	8
Deposit To Date	The end of the deposit cycle for which the user needs to verify.	Field	Date (MM/DD/CCYY)	8
Report Type	Indicates whether the user is requesting a trial or final run.	Combo Box	Drop Down List Box	0
Save	Allows the user to save the report request.	Button	N/A	0

6.129.4 Reports - Cash Receipt and Disposition Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Deposit From Date	Field	1	Deposit From Date is Required.	Please enter a valid Deposit From Date.
Deposit To Date	Field	1	Deposit To Date is Required.	Please enter a valid Deposit To Date.
	Field	2	Deposit To Date cannot be greater than current date.	Please correct the Deposit To Date.
Save	Button	1	Report Request Record Already Exists.	Cannot enter a new request until report is generated.

6.129.5 Reports - Cash Receipt and Disposition Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.129.6 Reports - Cash Receipt and Disposition Panel Accessibility

6.129.6.1 To Access the Reports - Cash Receipt and Disposition Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports.**	TPL Reports panel displays.
3	Click Cash Receipt and Disposition.	Cash Receipt and Disposition panel displays.

6.129.6.2 To Navigate on the Reports - Cash Receipt and Disposition Panel

Step	Action	Response
1	Enter **Deposit From Date** in MM/DD/CCYY format.	
2	Enter **Deposit To Date** in MM/DD/CCYY format.	
3	Select **Report Type** from drop down list box.	
4	Click **View**.	Cash Receipt and Disposition report is displayed.

6.130 Reports - Casualty Collections Panel Overview

6.130.1 Reports - Casualty Collections Panel Narrative

The Casualty Collections panel allows the user to enter criteria to display the TPL Casualty Collections (online) report.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Casualty Collections]

6.130.2 Reports - Casualty Collections Panel Layout

6.130.3 Reports - Casualty Collections Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Report Format	Allows the user to select the format in which to display the report. Valid options are: HTML, PDF and Excel.	Combo Box	Drop Down List Box	0
Search Month	The date criteria on which to run the report, in CCYYMM format.	Field	Date (CCYYMM)	6
View	Button that displays the report requested.	Button	N/A	0

6.130.4 Reports - Casualty Collections Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Search Month	Field	1	Search Month must be 6 character(s) in length.	Enter a 6 digit (CCYYMM) date.
	Field	2	Search Month is not Valid.	Please enter year and month CCYYMM.
	Field	3	Search Month Must be 6 character(s) in length.	Verify that all 6 characters for year and Month are entered. CCYYMM.

6.130.5 Reports - Casualty Collections Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.130.6 Reports - Casualty Collections Panel Accessibility

6.130.6.1 To Access the Reports - Casualty Collections Panel

Step	Action	Response
1	Enter **User Name** and **Password**; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Casualty Collections.	Casualty Collections panel displays.

6.130.6.2 To Navigate on the Reports - Casualty Collections Panel

Step	Action	Response
1	Enter **Search Month** in CCYYMM format. Note: Search Month is a required field.	
2	Select **Report Format** from drawn down list. Valid values include: HTML, PDF and Excel. Note: Default format is HTML.	
3	Click **View**.	Casualty Collections report is displayed.

6.131 Reports - Employers By Carrier Panel Overview

6.131.1 Reports - Employers By Carrier Panel Narrative

The Employers by Carrier panel allows the user to enter criteria to display the Employer By Carrier - online report.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Employers By Carrier]

6.131.2 Reports - Employers By Carrier Panel Layout

6.131.3 Reports - Employers By Carrier Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Carrier Number	The unique user-defined carrier identification number.	Field	Character	7
Report Format	Allows the user to select the format in which to display the report. Valid options are: HTML, PDF and Excel.	Combo Box	Drop Down List Box	0
[Search]	Search link allows for a more detailed search for a carrier using the identification number.	Hyperlink	N/A	0
View	Button that displays the report requested.	Button	N/A	0

6.131.4 Reports - Employers By Carrier Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.131.5 Reports - Employers By Carrier Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.131.6 Reports - Employers By Carrier Panel Accessibility

6.131.6.1 To Access the Reports - Employers By Carrier Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports.**	TPL Reports panel displays.
3	Click Employers By Carrier.	Employers By Carrier panel displays.

6.131.6.2 To Navigate on the Reports - Employers By Carrier Panel

Step	Action	Response
1	Enter Carrier Number. Note: Carrier Number is a required field. Users may obtain number from [Search] field.	
2	Select **Report Format** from drown down list. Valid values include: HTML, PDF and Excel. Note: Default format is HTML.	
3	Click **View**.	Employers By Carrier report is displayed.

6.132 Reports - Recipients By Carrier Panel Overview

6.132.1 Reports - Recipients By Carrier Panel Narrative

The Recipients by Carrier panel allows the user to enter criteria to display the online report. This report identifies which recipients have coverage with a carrier. The user specifies the insurance carrier by name. All active and inactive recipients associated with the carrier are displayed on the report.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Recipients By Carrier]

6.132.2 Reports - Recipients By Carrier Panel Layout

6.132.3 Reports - Recipients By Carrier Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Carrier Number	The unique user-defined carrier identification number.	Field	Character	7
Report Format	Allows the user to select the format in which to display the report. Valid options are: HTML, PDF and Excel.	Combo Box	Drop Down List Box	0
[Search]	Search link allows for a more detailed search for a carrier number using the identification number.	Hyperlink	N/A	0
View	Button that displays the report requested.	Button	N/A	0

6.132.4 Reports - Recipients By Carrier Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Carrier Number	Field	1	The Carrier does not exist, please use the [Search] button.	Use the Search hyperlink to search for a valid carrier.

6.132.5 Reports - Recipients By Carrier Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.132.6 Reports - Recipients By Carrier Panel Accessibility

6.132.6.1 To Access the Reports – Recipients By Carrier Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports.**	TPL Reports panel displays.
3	Click Recipients By Carrier.	Recipients By Carrier panel displays.

6.132.6.2 To Navigate on the Reports - Recipients By Carrier Panel

Step	Action	Response
1	Enter Carrier Number. Note: Carrier Number is a required field. Users may obtain number from [Search] field.	
2	Select **Report Format** from drown down list. Valid values include: HTML, PDF and Excel. Note: Default format is HTML.	
3	Click **View**.	Recipients By Carrier report is displayed.

6.133 Reports - Verification Letter Follow-Up Panel Overview

6.133.1 Reports - Verification Letter Follow-Up Panel Narrative

The Verification Letter Follow Up panel allows the user to enter criteria to display the Verification Letter Follow Up - online report. Based on the month/year entered, a list of all recipients that received a TPL-9007-D letter and are still in a non-verified status are reported.

This panel is inquiry only.

Navigation Path: [TPL] – [Reports] - [Verification Letter Follow Up]

6.133.2 Reports - Verification Letter Follow-Up Panel Layout

6.133.3 Reports - Verification Letter Follow-Up Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Report Format	Allows the user to select the format in which to display the report. Valid options are: HTML, PDF and Excel.	Combo Box	Drop Down List Box	0
Search Month	The date parameter for the report, in CCYYMM format.	Field	Date (CCYYMM)	6
View	Button that displays the report requested.	Button	N/A	0

6.133.4 Reports - Verification Letter Follow-Up Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Search Month	Field	1	Invalid Date. Format is CCYYMM.	Enter a valid Date.

6.133.5 Reports - Verification Letter Follow-Up Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.133.6

6.133.7 Reports - Verification Letter Follow-Up Panel Accessibility

6.133.7.1 To Access the Reports – Verification Letter Follow-Up Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to **TPL** and click **Reports**.	TPL Reports panel displays.
3	Click Verification Letter Follow-Up.	Verification Letter Follow Up panel displays.

6.133.7.2 To Navigate on the Reports - Verification Letter Follow-Up Panel

Step	Action	Response
1	Enter **Search Month** in CCYYMM format. Note: Search Month is a required field.	
2	Select **Report Format** from drown down list. Valid values include: HTML, PDF and Excel. Note: Default format is HTML.	
3	Click **View**.	Verification Letter Follow-Up report is displayed.

6.134Prebill Claims Search Panel Overview

6.134.1 Prebill Claims Search Panel Narrative

The Prebill Claims Search panel allows the user to search for potential claims.

This panel is inquiry only.

Navigation Path: [TPL] – [Prebill Claims Search]

6.134.2 Prebill Claims Search Panel Layout

6.134.3 Prebill Claims Search Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
Bill Type	The type of billing the user needs to view.	Combo Box	Drop Down List Box	0
Claims to View	The claims to include in the search. Values = All, Includes Only, or Excludes Only.	Combo Box	Drop Down List Box	0
Clear	Clears the search criteria.	Button	N/A	0
Current ID	Recipient’s identification number.	Field	Number (Integer)	12
ICN [Search]	Internal control number that is assigned to each claim to track activity through the claim process.	Hyperlink	N/A	0
Provider ID [Search]	Identifies the provider of services.	Hyperlink	N/A	0
Records	Allows the user to select the number of search items to display per page.	Combo Box	Drop Down List Box	0
Save	Allows the user to save changes made to the Search Results.	Button	N/A	0
Search	Button that initiates a search based on criteria entered into search fields.	Button	N/A	0

6.134.4 Prebill Claims Search Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
Bill Type	Field	1	Bill Type is Required.	Please select a bill type from the dropdown box.
	Field	2	The combination must include the Bill Type.	Select Bill Type from the drop down list.
	Field	91024	*** No rows found ***	Verify entry - If correct then no TPL data available for that search criteria.
Current ID	Field	91024	*** No rows found ***	Verify entry - If correct then no TPL data available for that search criteria.
ICN	Field	91024	*** No rows found ***	Verify entry - If correct then no TPL data available for that search criteria.
Provider ID	Field	91024	*** No rows found ***	Verify entry - If correct then no TPL data available for that search criteria.

6.134.5 Prebill Claims Search Panel Extra Features

Field	Field Type
No extra features found for this panel.	

6.134.6 Prebill Claims Search Panel Accessibility

6.134.6.1 To Access the Prebill Claims Search Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to TPL and click Prebill Claims Search.	Prebill Claims Search panel displays.

6.135Prebill Claims Search Results Panel Overview

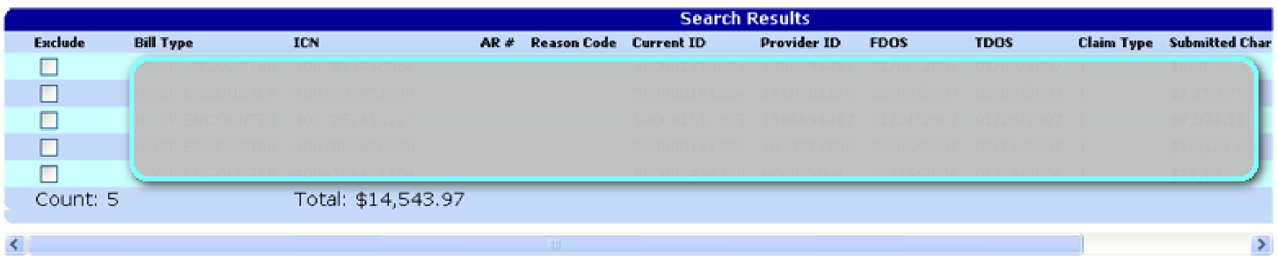
6.135.1 Prebill Claims Search Results Panel Narrative

The Prebill Claims Search Results panel provides users with the capability to view all claims selected for potential billing, rebilling or recoupments prior to the production run. .

This panel is display only.

Navigation Path: [TPL] – [Prebill Claims Search] - [Search] - [Prebill Claims Search Results] - [Add]

6.135.2 Prebill Claims Search Results Panel Layout



6.135.3 Prebill Claims Search Results Panel Field Descriptions

Field	Description	Field Type	Data Type	Length
AR #	The accounts receivable number to be closed during the production run.	Label	Character	13
Bill Type	The process that identified the claim for billing, rebilling, or recoupment.	Label	Character	20
Claim Type	The type of claim billed to Medicaid. Identifies the claim type code, not description.	Label	Character	1
Current ID	Member's identification number.	Label	Number (Integer)	12
Exclude	By checking the box the user can exclude the selected claims from the billing process.	Combo Box	Check box	0
FDOS	From date of service. This is the beginning date of service that the claim was submitted for.	Label	Date (MM/DD/CCYY)	8
ICN	Internal control number that is assigned to each claim to track activity through the claim process.	Label	Character	13
Provider ID	Identifies the provider of services.	Label	Number (Integer)	9
Reason Code	Reason code associated with the claim.	Label	Character	3

Field	Description	Field Type	Data Type	Length
Submitted Charges	The amount the provider submitted on the claim.	Label	Number (Decimal)	12
TDOS	To date of service. This is the ending date of service that the claim was submitted for.	Label	Date (MM/DD/CCYY)	8
Total	The total amount Medicaid paid on all claims being displayed in the result list.	Label	Number (Decimal)	14

6.135.4 Prebill Claims Search Results Panel Field Edit Error Codes

Field	Field Type	Error Code	Error Message	To Correct
No field edits found for this panel.				

6.135.5 Prebill Claims Search Results Panel Extra Features

The only rebilling records that are displayed on the panel are those where the reason code = X30, X, R61, R62, R91, or C. Descriptions of all rebilling reason codes:

space - Rebill in 60 or 90 days

S - No response in 12 months
X30 - AR is closed with a disposition amount less than the billed amount and claim as been adjusted with a Medicaid paid amount greater than zero and is covered by the Matrix
X - AR is open and claim has been adjusted with a Medicaid paid amount greater than zero and is covered by the Matrix

46 - The coverage codes have been updated and the service is no longer covered by the Matrix

28 - The coverage dates have been updated and no longer cover the claim dates of service

R61 - The policy number has been updated and the AR is closed with a total disposition amount less than the AR billed amount.

R62 - The policy number has been updated and the AR is open.

31 - The suspect code has been updated to other than valid or non-verified.

R - The user has requested a manual rebill.

R91 - The carrier code has been updated and the AR is closed with a total disposition amount less than the AR billed amount.

C - The carrier code has been updated and the AR is open.

W - The AR is open but the claim has been adjusted with either a Medicaid paid amount of zero, denied, or is not covered by the Matrix.

6.135.6 Prebill Claims Search Results Panel Accessibility

6.135.6.1 To Access the Prebill Claims Search Results Panel

Step	Action	Response
1	Enter User Name and Password; Click Login.	Main Menu page displays.
2	Point to TPL and click Prebill Claims Search.	Search panel displays.
3	Enter Search Criteria. Note: Bill Type is required.	
4	Click **Search**.	Prebill Claims Search Results display.

6.135.6.2 To Update the Prebill Claims Search Results Panel

Step	Action	Response
1	Check **Exclude**.	
2	Click **Save**.	Prebill Claims Search results information is saved.